

THE STATE OF SUSTAINABILITY IN ASSOCIATIONS

**Global Insights by ICCA
and Destination Canada**

2025

**A collaboration between the International Congress and
Convention Association (ICCA) and Destination Canada**



ICCA

CANADA*



Executive Summary

The State of Sustainability in Association Events

Two years after Destination Canada launched one of the most ambitious [national sustainability plans](#) in the meetings industry, and amid growing global commitments to Net Zero targets, this year's report reveals an industry caught between aspiration and action.

The Bottom Line: While 66% of international associations rate sustainability as very or extremely important to their organizations, a 6% increase from 2023, the gap between stated commitment and operational implementation remains stubbornly wide. For example, 24% of associations still don't measure their carbon footprint and 13% are not aware of such tools.

Four Critical Findings

- 1. The Measurement Gap Persists:** Organizations have integrated sustainability into event planning procedures (62%) and/or business and strategic planning (50%), but accountability mechanisms lag far behind. Only 33% include sustainability in their event codes of conduct, and formal reporting structures show minimal integration. This pattern mirrors 2023 exactly, when event planning and strategic planning also ranked as the top two most integrated areas, revealing that organizations remain comfortable with high-level commitment, but are reluctant to embed sustainability into accountability frameworks.
- 2. Cost Dominates Every Conversation:** Some 63% cite cost as the primary barrier to sustainable events, yet 46% express a willingness to pay a little bit more for sustainable options. This suggests that the challenge isn't price sensitivity alone—it is value perception and the positioning of sustainability as premium rather than standard.
- 3. The Demand Signal Is Mixed:** Only 15% of associations report significant increases in participant requests for sustainable options, while 34% see no change. The sustainability push comes from organizational leadership, not member pressure—presenting both opportunities and risks.
- 4. UN SDGs See Selective Adoption:** While 36% of associations commit to the United Nations Sustainable Development Goals (UN SDGs), implementation clusters around comfortable social goals, such as Gender Equality (46%) and Quality Education (45%), while environmental goals lag behind (Climate Action: 27%).

What This Means

Associations globally have moved beyond debating whether sustainability matters—**66% now rate it as very or extremely important**. However, they now find themselves caught between aspiration and implementation. While strategic commitment exists, organizations lack confidence in measurement methods, accountability frameworks and cost-neutral pathways that would enable them to translate values into systematic action.

The associations that will lead in sustainability are those willing to move beyond strategic planning into measurable performance indicators, transparent reporting and ownership of their environmental footprint.

Success will require partnership. Destinations and meeting suppliers who make sustainability simple, measurable and financially accessible will be best positioned to support associations in reaching the implementation phase.

Methodology

Survey Design and Administration

This survey was conducted between May and August 2025 through a partnership between the International Congress and Convention Association (ICCA) and Destination Canada. It builds on baseline data collected in 2023, enabling year-over-year comparisons of sustainability trends in the international meetings industry.

Response Profile

- **Total Responses:** 249 (178 complete, 71 partial, 71% completion rate)
- **Primary Focus:** Association/Non-Profit Organizations (125 responses representing 50.2% of total)
- **Geographic Distribution:**
 - North America: 33% (United States: 43 associations, Canada: 17 associations)
 - Europe: 49% (Belgium: 10, Austria: 7, UK: 7, with additional responses from 15+ European countries)
 - Asia Pacific: 12%
 - South America: 4%
 - Africa: 2%

Respondent Characteristics

Event Rotation Patterns:

- Global rotation (continent to continent): 26%
- National rotation: 31%
- Regional rotation: 14%
- No rotation: 21%
- Not applicable: 7%

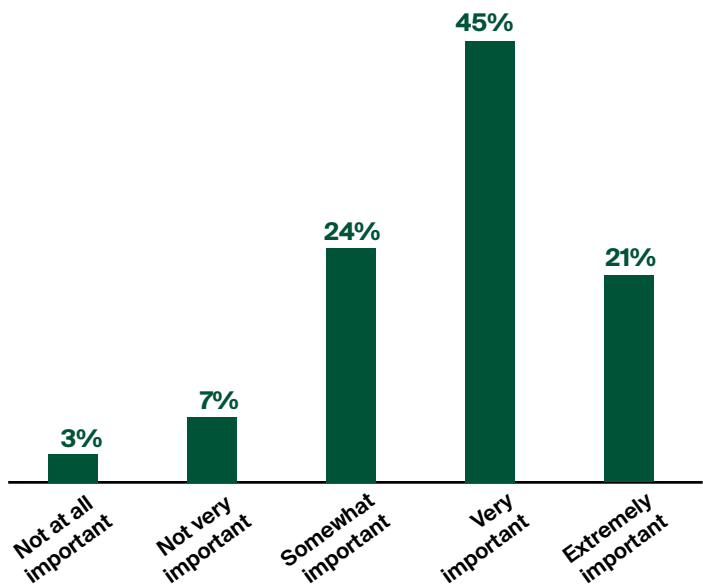
Note on Analysis

This report primarily focuses on responses from association/non-profit organizations (125 respondents) to maintain consistency with organizational decision-making patterns. Therefore, responses from broader event industry perspectives, including those from suppliers, corporate planners, and convention and visitors bureaus (CVBs) are not being taken into consideration.

Key Findings

1. The Importance of Sustainability: High Priority, Low Accountability

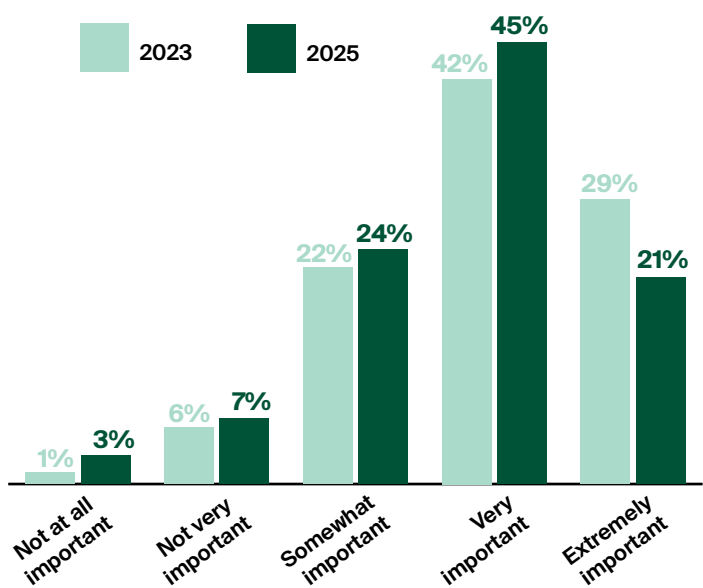
How important is sustainability to your organization?



Sustainability has firmly established itself as a strategic priority for most of the international associations:

- **66%** rate sustainability as very important (45%) or extremely important (21%)
- **24%** rate it as somewhat important
- **10%** rate it as not very important (7%) or not at all important (3%)

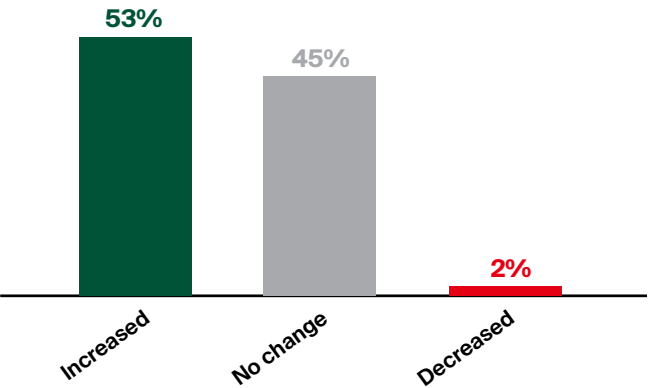
How important is sustainability to your organization? 2023 vs. 2025



Year-Over-Year Momentum:

Some 53% of associations report that the importance of sustainability has **increased** compared to the previous year, while 45% report no change and only 2% report a decrease.

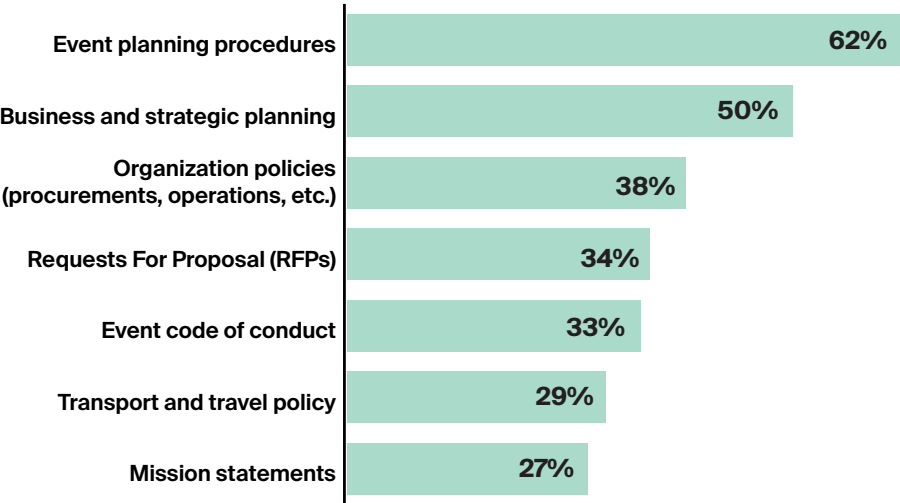
Compared to last year, has the importance of sustainability to your organization increased or decreased?



The Implementation Hierarchy:

Whilst strategic importance is high, integration follows a clear hierarchy:

Which of the following sustainability efforts are embedded into your organization?



What This Reveals: Organizations embrace sustainability at the operational and strategic planning levels (62% and 50% respectively) but show significantly lower integration into formal accountability mechanisms such as codes of conduct (33%), RFPs (34%), and transport and travel policy (29%).

This finding suggests that sustainability remains more comfortable as a planning consideration than as a binding commitment embedded in organizational policy, procurement decisions or public-facing documents.

2. How Associations Define Sustainability

Top Priority Statements:

	Pillar
 1. Promotes social equity, diversity and inclusiveness	Social
 2. Minimizes the negative impact of its activities on the natural environment	Environmental
 3. Takes into consideration its impact on the environment	Environmental
 4. Respects cultural heritage and traditions	Social
 5. Generates positive impact and mitigates negative impact	Mixed
 6. Ensures financial stability	Economic

Compared to 2023, the top three definitions remain identical: social equity/diversity, equity and inclusion (DEI), minimizing environmental impact, and considering environmental impact. This consistency suggests these represent core organizational values rather than temporary trends.

Social sustainability defines the conversation: DEI (44%) ranks highest, reflecting that associations view sustainability through a social lens first, encompassing equity, diversity, inclusion and cultural respect. This aligns with associations' core missions around community, belonging and cultural respect.

Environmental awareness is strong but lacks operational translation: Two environmental statements rank second and third (40% and 38% respectively), yet earlier findings show only 39% actively use carbon calculators and 43% either don't measure or delegate measurement entirely. Associations recognize environmental responsibility in principle but struggle to implement it systematically in practice.

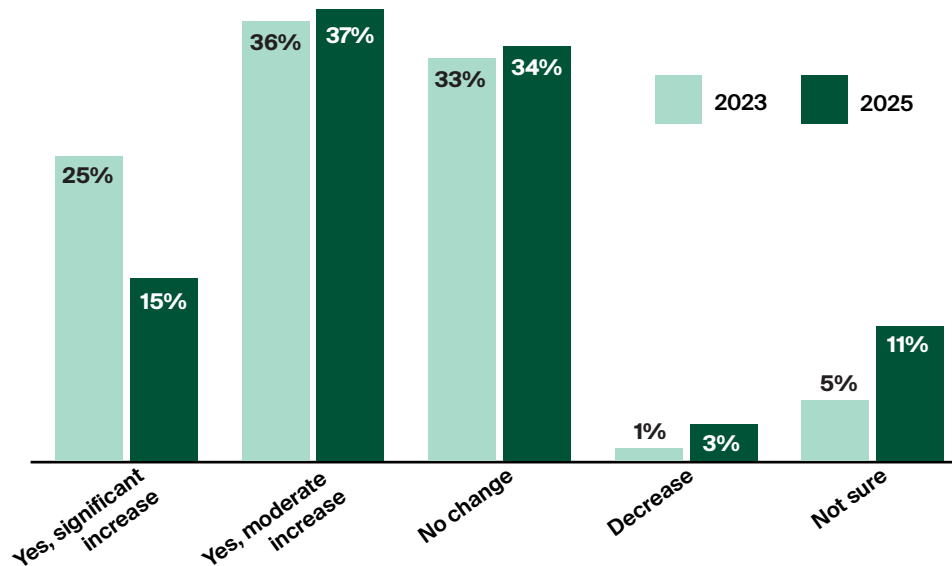
The translation challenge: The consistency between 2023 and 2025, with identical top three priorities, reveals that whilst definitions have stabilized, the translation challenge persists. Associations have clarity on what sustainability means to them (social equity, environmental impact, cultural respect) but continue to struggle with how to operationalize these definitions, particularly on the environmental pillar, where measurement and accountability mechanisms remain underdeveloped.

3. Participant Demand for Sustainability: A Shift from 2023

When asked whether they've seen an increase in participants requesting more sustainable options at events, the 2025 results reveal a noticeable shift compared to the 2023 results.

Have you seen an increase in participants requesting more sustainable options/ initiatives at events?

Participant Demand Trends (2025 vs. 2023):



While organizational commitment to sustainability has increased (66% rate it very/extremely important, up from 60% in 2023), **perceived participant demand has softened**. Those reporting "significant increases" in member requests dropped by 10 percentage points, while uncertainty about demand ("not sure") doubled from 5% to 11%.

This decline could reflect several scenarios:

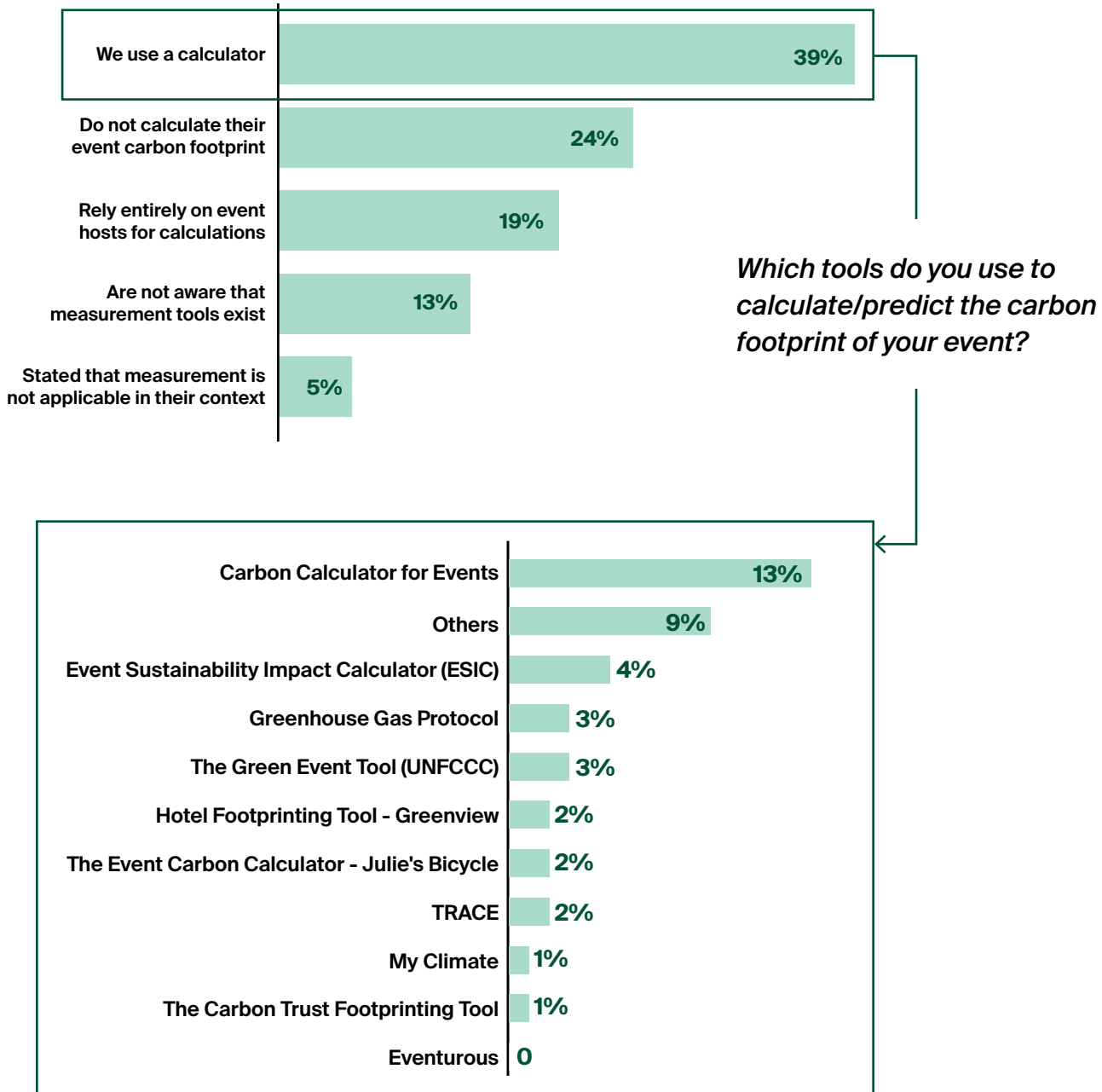
- 1. Normalization:** As sustainability becomes integrated into operations (62%), participants may no longer view it as something requiring special requests.
- 2. Expectations met:** Early vocal demand may have been satisfied as sustainable options became more standard, reducing the need for explicit requests.
- 3. Policy and political flux:** The 2025 survey period coincided with significant shifts in sustainability policies in many regions, including changes to climate commitments, sustainability reporting and Environmental, Social and Governance (ESG) frameworks. This policy uncertainty may have dampened explicit sustainability demands as participants and organizations alike await greater regulatory clarity.
- 4. Measurement challenge:** The six-point increase in "not sure" responses (from 5% to 11%) suggests many organizations genuinely don't know what their participants want—pointing to a communication or feedback gap that may be masking underlying demand.

The decline in vocal participant requests does not necessarily indicate reduced commitment to sustainability. Rather, it may signal that sustainability is transitioning from "special request" to "expected standard"—a positive evolution. However, the doubled "not sure" rate suggests many associations lack clear feedback channels to understand member expectations.

4. You Can't Manage What You Don't Measure

Perhaps one of the most significant findings in this survey is the persistent gap in carbon footprint measurement.

Current Measurement Practices:



Comparison to 2023: This represents **meaningful improvement** from 2023, when 45% did not calculate footprints and 21% relied on hosts, compared to 24% and 19% now. This reduction suggests that awareness campaigns and industry pressure are beginning to move behaviour, though significant gaps remain.

A Story of Progress:

 Positive trend Associations failing to calculate their carbon footprint at all dropped by nearly half (45% → 24%).	 Persistent delegation At 43%, the percentage of associations that either don't measure their footprint (24%) or outsource it to hosts (19%) remains close to 2023's 45%. This suggests many organizations shifted from non-measurement to delegation, rather than ownership, of measurement.	 Tool awareness improved Those unaware of the carbon footprint calculation tools that exist dropped from 15% to 13%.
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Tools and Resources:

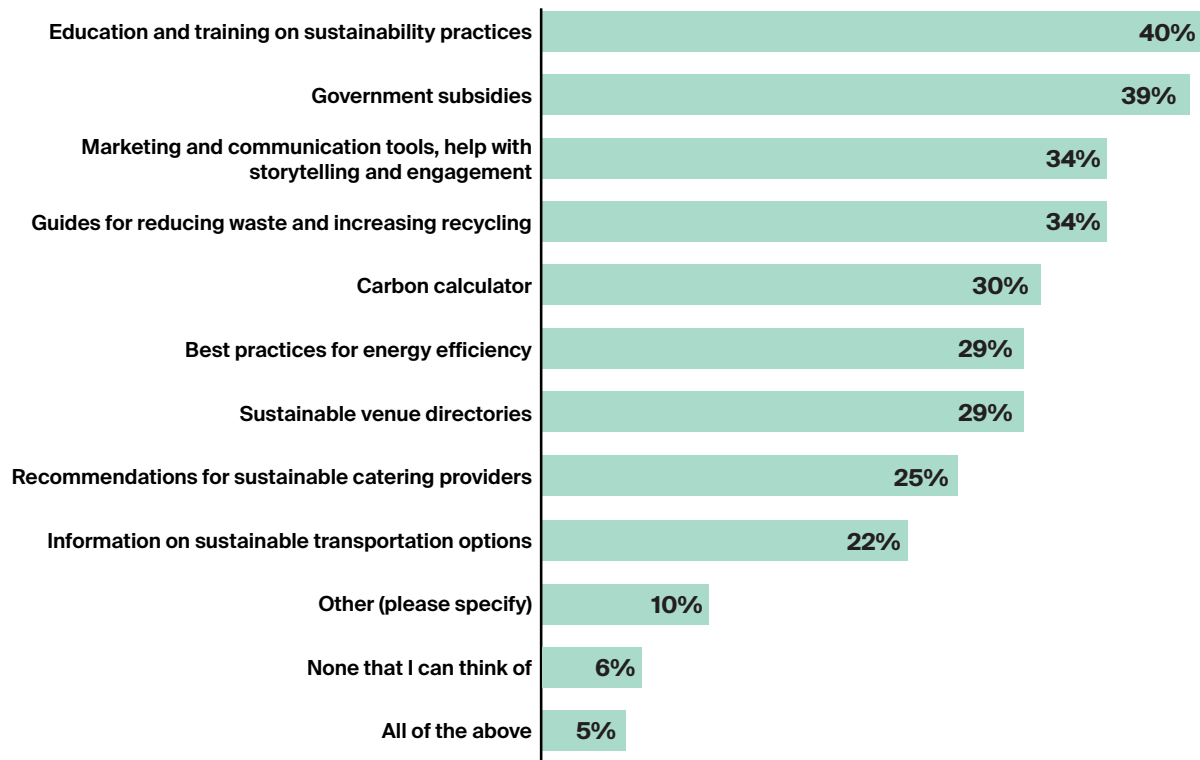
When asked what resources would be most helpful, associations answered as follows:

1. Education and training on sustainability practices: **40%**
2. Government subsidies: **39%**
3. Guides for waste reduction and recycling: **34%**
4. Marketing and communication tools: **34%**

Associations want education and financial support more than measurement tools, revealing that the barrier isn't tool availability, it's knowledge about how to use them and confidence in acting on the results. However, in the context of current measurement practices, this tells a nuanced story. Whilst a greater proportion of associations are now actively using calculator tools, there is still a persistent percentage relying on hosts. This suggests that whilst awareness campaigns are working to reduce complete non-measurement, confidence-building around self-directed measurement and interpretation still lags behind.

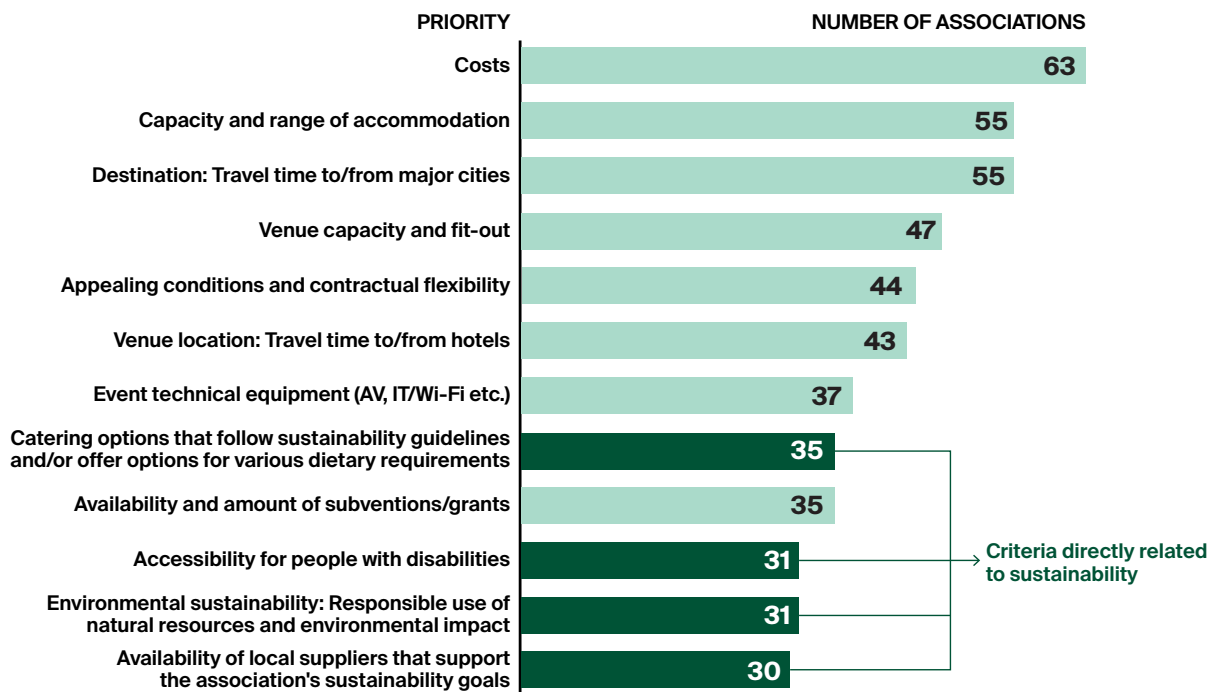
This gap also represents a business opportunity for destinations and meeting suppliers who can provide turnkey measurement services and capacity-building support as standard offerings rather than premium add-ons.

What resources would be helpful in planning more sustainable events?



5. The RFP: Cost and Capacity Over Sustainability

When designing RFPs for event procurement, associations prioritize practical and financial factors:



The highest-ranking criterion directly related to sustainability is **"Catering options that follow sustainability guidelines and/or offer options for various dietary requirements"**, ranking eighth of 24 options.

Environmental sustainability ranks 11th among decision criteria, behind cost, capacity, location, and even catering preferences. This isn't necessarily hypocrisy: it reflects the practical reality that events must first meet basic operational requirements before sustainability can be considered. However, the data also shows that **when sustainability is framed as meeting operational needs** (e.g. sustainable catering or accessibility), it receives higher consideration than when positioned as abstract environmental goals (e.g. environmental sustainability or SDG alignment).

Qualitative Insights from Respondents: Factors frequently mentioned outside formal criteria:

- "Preference of local member association"
- "Accessibility for people with cognitive impairment"
- "Safety, and friendly business environment"
- "The ability of the destination to attract a large audience"
- "Political context"
- "Shared values of host destination and academic partners"

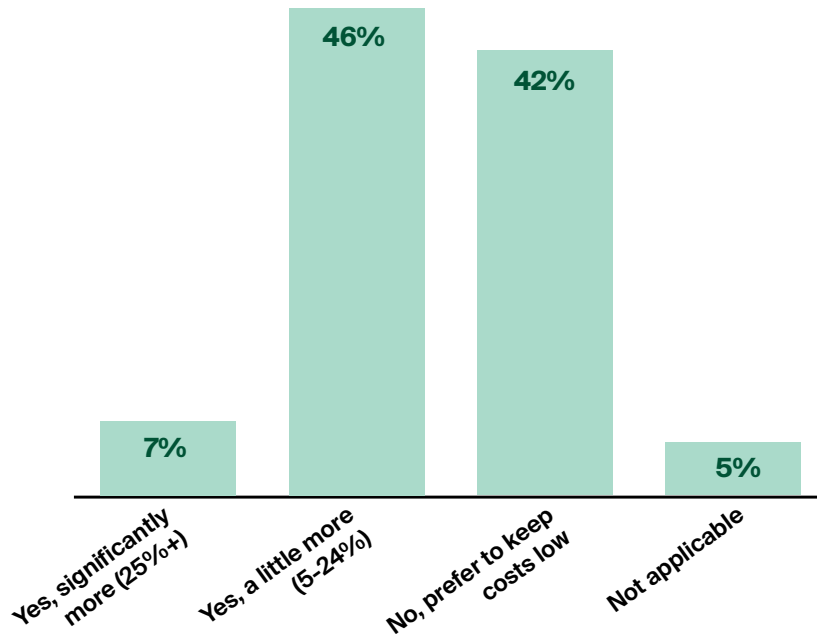
Strategic Opportunity: Destinations that can demonstrate sustainability whilst meeting cost, capacity and accessibility requirements will be more likely to win bids. For example, waste reduction saves costs, local sourcing supports capacity, and accessible design benefits all attendees. Those who position sustainability as a trade-off against these factors will ultimately lose. The key is integration—sustainability that solves operational challenges, rather than as a separate premium offering.

6. Willing to Pay More, But Not Much More

Cost dominates sustainability conversations. Half of associations cite cost as the main barrier to planning sustainable events, by far the highest response, with the next highest, educating attendees, only cited by 24% of associations. Yet willingness to pay tells a more nuanced story.

Appetite for Increased Investment: When asked if they are willing to pay more for sustainable options, 46% said yes, provided the increase is minimal and manageable.

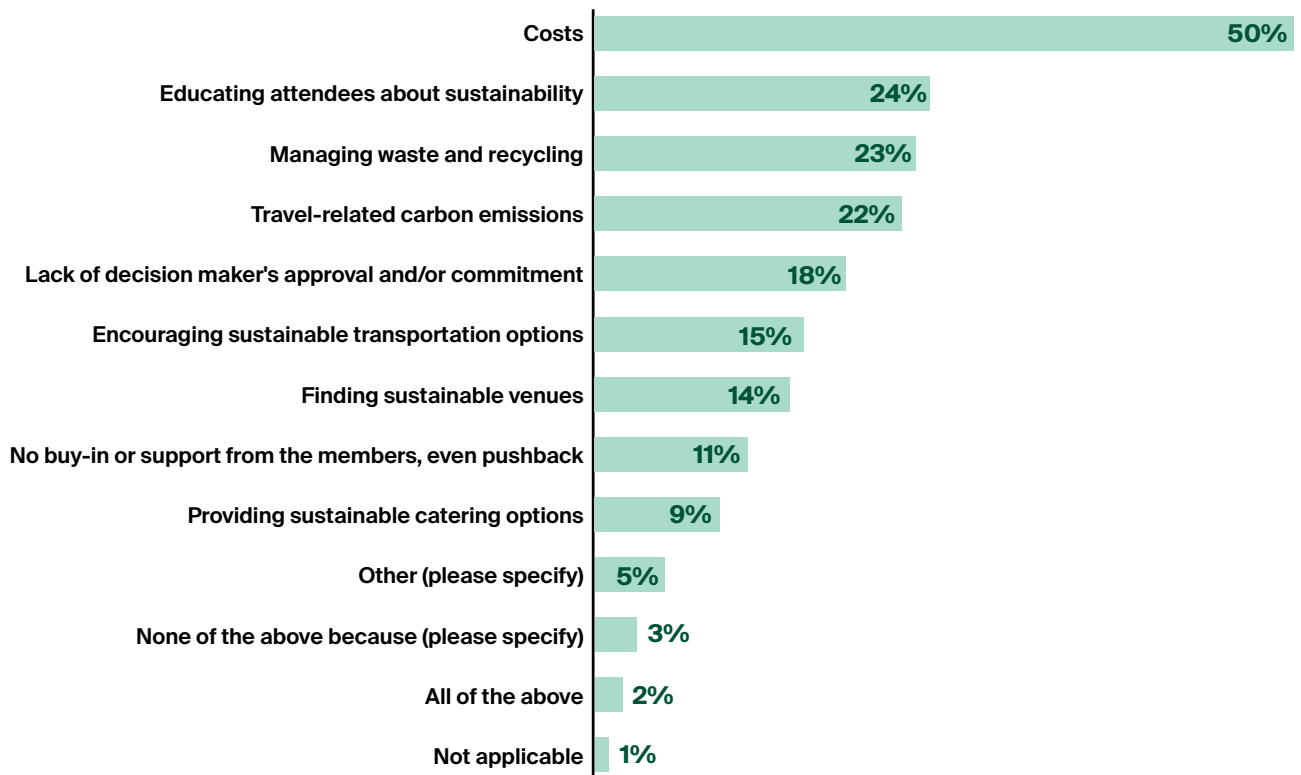
Would your organization be willing to pay more for sustainable event options?



Representative Comments:

- "I want to say yes, a little more, but unfortunately it all comes down to budget. If we can fit it into our budget and still hit our target, then yes."
- "Sustainable options don't have to be more expensive."
- "Depends on the item we are making more sustainable."

What challenges have you faced when planning sustainable events?

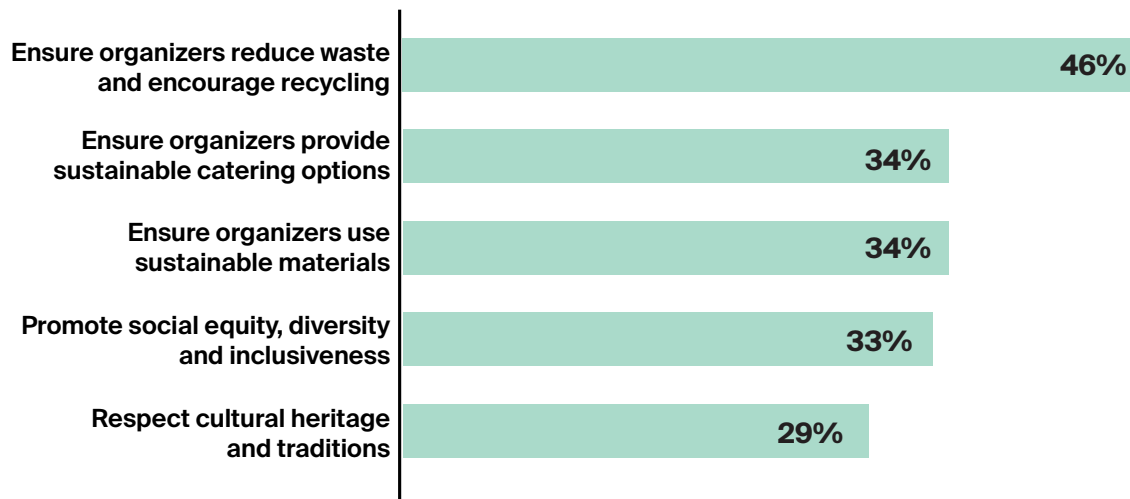


The gap between stated barriers (50% cite cost) and actual willingness to pay (46% willing to pay 5-24% more) reveals a perception problem rather than an absolute price barrier. Many respondents believe sustainability should be cost-neutral, as reflected in comments like, "Sustainable options don't have to be more expensive." This suggests the challenge lies not in unwillingness to invest, but in how sustainability is positioned: as a premium add-on rather than a core operational practice that can be delivered within existing budgets. Destinations and suppliers who can demonstrate cost parity—or even cost savings through efficiency gains—will overcome this barrier more effectively than those justifying premium pricing.

7. Implementation: What Organizations Actually Do

When associations do implement sustainability practices, they cluster around visible, guest-facing actions:

Top 5 Sustainable Event Practices:

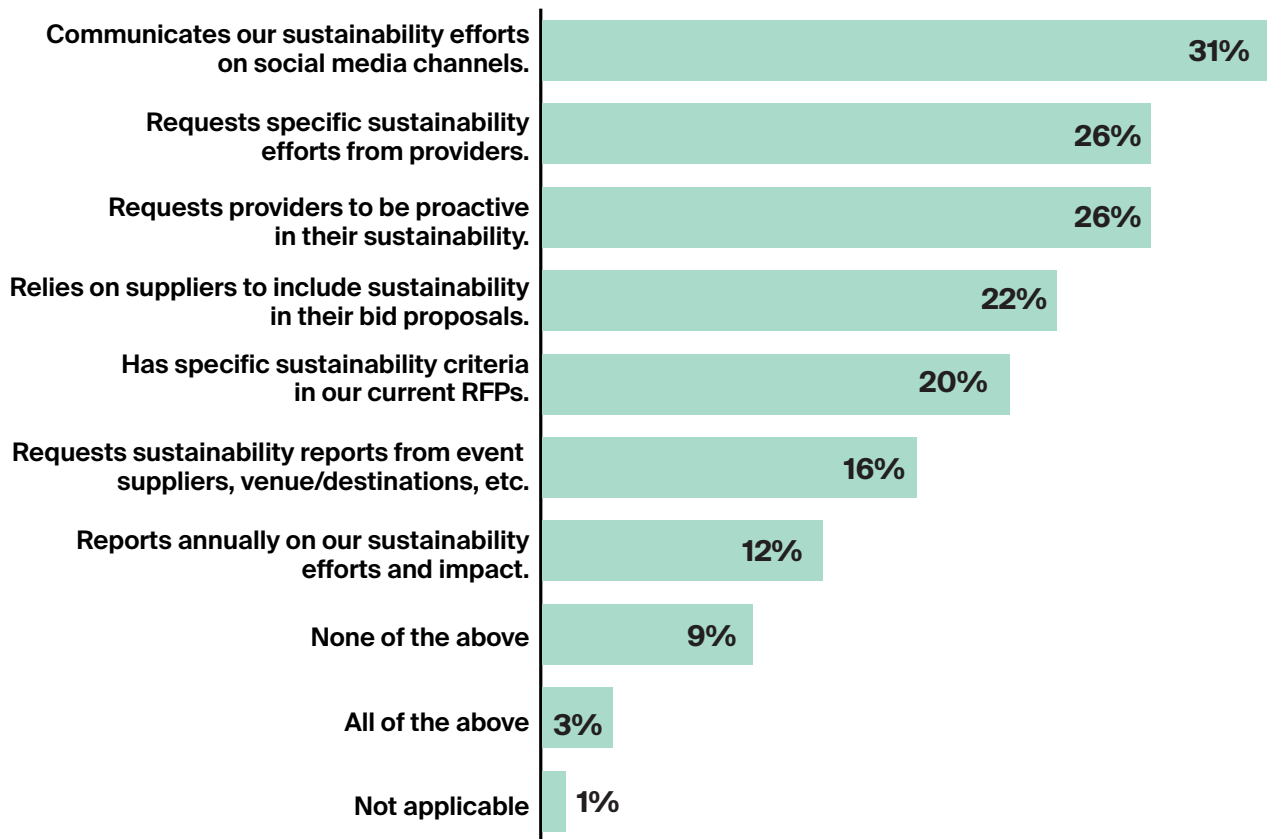


Organizations often opt for visible, operationally simple actions (such as waste reduction, sustainable catering and materials) over systematic, measurement-based approaches (carbon accounting, supplier sustainability audits, lifecycle impact assessment).

Communication Practices:

- Only **12%** mention sustainability efforts in annual reports
- **31%** communicate sustainability on social media
- **20%** have specific sustainability criteria in RFPs
- **26%** request specific sustainability efforts from providers

Check all the statements that apply. "Our organization..."



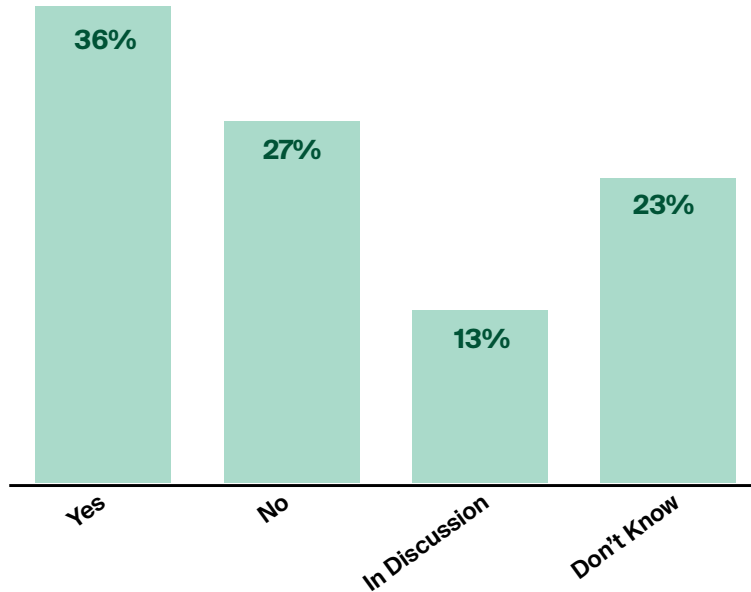
Strategic Implication: The data reveal a clear hierarchy in sustainability implementation—organizations favour operationally straightforward, visible actions that can be easily communicated to attendees, whilst avoiding accountability mechanisms that require deeper organizational change. Only 12% report sustainability efforts in annual reports, and just 20% embed specific sustainability criteria in RFPs—the formal mechanisms that would create binding commitments and enable performance tracking over time.

This pattern suggests sustainability is being implemented selectively: organizations adopt practices that demonstrate commitment without requiring fundamental changes to decision-making processes, budget allocation frameworks, or transparent performance reporting. The result is genuine, but limited, progress: real operational improvements in waste and catering, but without the systematic measurement and accountability infrastructure needed to drive continuous improvement or achieve meaningful carbon reduction targets.

8. UN SDGs: Uneven Awareness, Selective Implementation

Overall Commitment:

Is your organization committed to the United Nations Sustainable Development Goals (UN SDGs)?



More than a third of associations (36%) have committed to the UN SDGs. However, nearly a quarter (23%) remain unaware of them, or their relevance to their organization. The 13% currently “in discussion” suggests growing interest, though uncertainty about implementation persists.

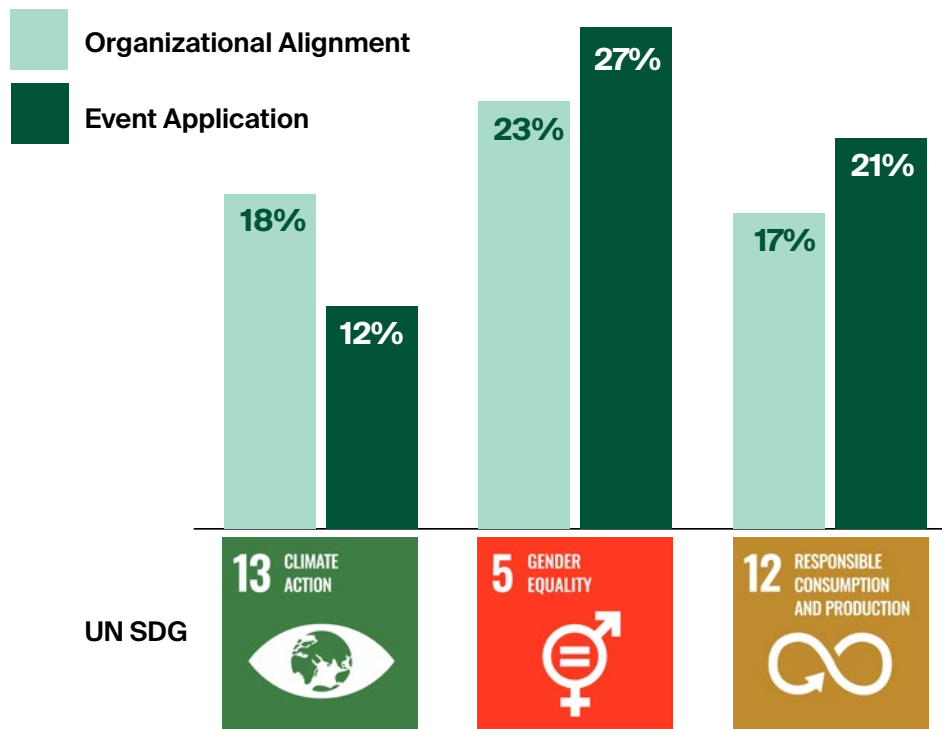
Organizational UN SDG Alignment (Top 5):

1. Good Health and Well-being (SDG 3): 26%
2. Quality Education (SDG 4): 24%
3. Gender Equality (SDG 5): 23%
4. Partnerships For The Goals (SDG 17): 20%
5. Climate Action (SDG 13): 18%

UN SDGs Applicable to Events (Top 5):

1. Gender Equality (SDG 5): 27%
2. Quality Education (SDG 4): 26%
3. Good Health and Well-being (SDG 3): 25%
4. Responsible Consumption and Production (SDG 12): 21%
5. Tied:
 - Sustainable Cities and Communities (SDG 11): 15%
 - Partnerships For The Goals (SDG 17): 15%

Key Comparison: Organization vs. Events



The survey reveals that organizations gravitate toward goals that are:

- **Socially-focused:** Gender equality, education and health
- **Mission-aligned:** Professional associations naturally align with education and health goals
- **Easier to operationalize:** Speaker diversity policies vs. lifecycle carbon accounting

Meanwhile, environmental goals lag significantly, in both organizational alignment and applicability to events:

- Climate Action (SDG 13): 12% (events), 18% (organization)
- Life Below Water (SDG 14): 10% (events), 12% (organization)
- Life on Land (SDG 15): 9% (events), 12% (organization)
- Clean Water and Sanitation (SDG 6): 9% (events), 11% (organization)

The Strategic Gap: Despite Climate Action being an urgent global priority with clear event industry implications (travel emissions, energy consumption), only 12% align their events with this goal, representing a drop of six percentage points from organizational alignment (18%). This reveals that organizations acknowledge climate commitments at the strategic level, but struggle to translate them into event-level actions.

In contrast, Gender Equality and Responsible Consumption and Production show more substantial alignment at the event level than the organizational level, suggesting these goals have clearer, more actionable pathways for event implementation (speaker diversity, waste reduction, sustainable catering) compared to Climate Action (carbon measurement, emissions reduction).

9. Sustainable Transport: The Paradox Continues

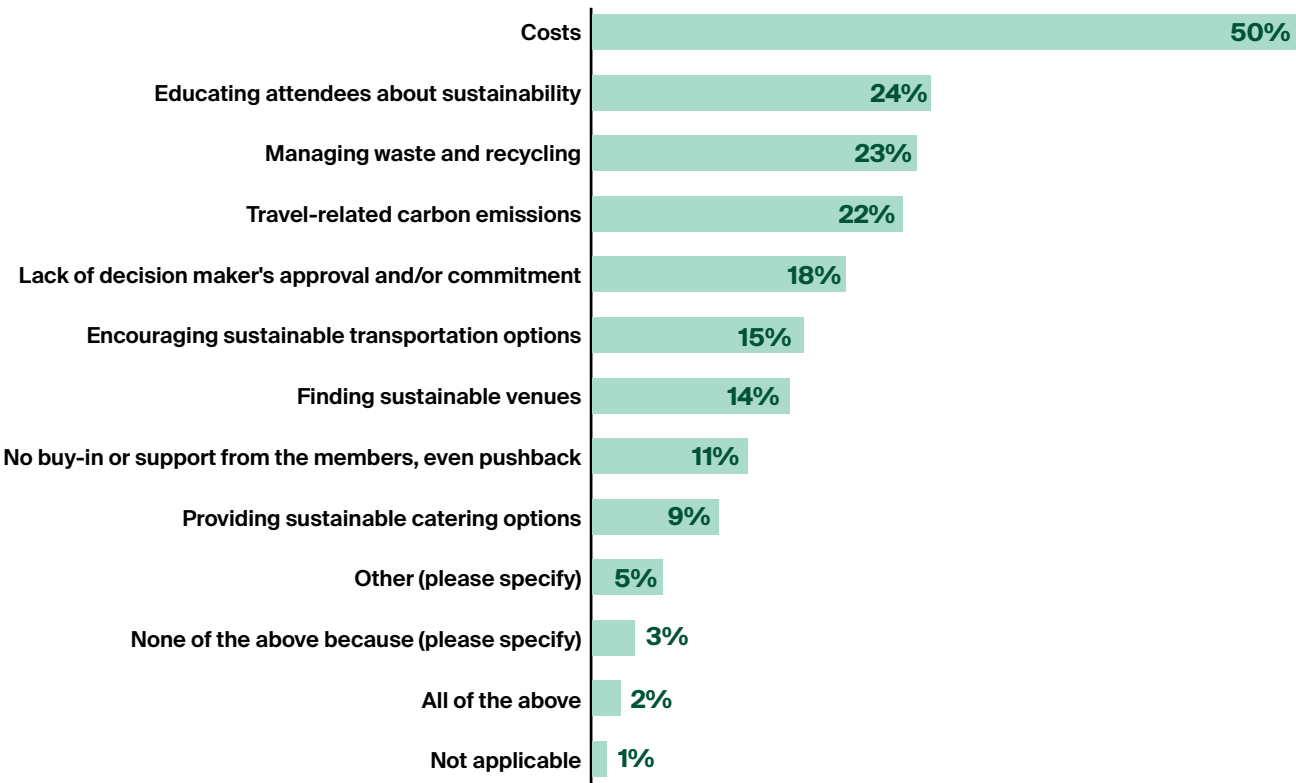
Transportation represents the single largest source of carbon emissions for most international events, yet organizational responses reveal cognitive dissonance.

Event Rotation Patterns: 57% of associations follow rotation patterns that maximize travel distance:

- Global rotation (continent to continent): 26%
- National rotation: 31%
- Regional rotation: 14%

Yet when asked about challenges faced in planning sustainable events, only 22% cite travel-related carbon emissions as a barrier - well behind cost (50%), and slightly behind both educating attendees (24%) and waste management (23%).

What challenges have you faced when planning sustainable events?



Sustainable Transportation Strategies

When asked how they encourage sustainable travel for attendees, associations' top two answers were:

1. Destination provides information on sustainable transportation options
2. Offer hybrid or virtual attendance options

Additional Observations:

- **Passive over active:** Providing information (30%) is far more common than structural solutions (hybrid options: 20%, carbon offset programs: 13%).
- **Significant inaction:** 15% don't encourage sustainable travel at all, and another 3% state it's not part of their policy.
- **Destination dependency:** Zero respondents reported that destinations offer incentives for sustainable transportation or shuttle services, suggesting either these services don't exist or associations aren't aware of them.
- **The unspoken trade-off:** Geographic equity and member representation compete directly with carbon emissions reduction, yet this tension is rarely addressed explicitly.

Respondent Strategies (Qualitative):

Organizations that do address transportation focus on destination-level solutions.

- *"Strategically select cities that offer inexpensive or included public transportation and venues within walking distance of accommodations"*
- *"Ensure that we utilize restaurants and services within walking distance to the main venue"*

The gap between rotation patterns (57% rotate globally/nationally) and perceived challenges (22% cite travel emissions) reveals cognitive dissonance. Organizations acknowledge the importance of sustainability whilst maintaining event structures that maximize the single largest source of emissions. This avoidance likely stems from the uncomfortable trade-off between values: reducing carbon emissions conflicts with longstanding commitments to geographic equity, member representation across regions, and the belief that rotating locations increases participation and engagement.

The focus on destination-level solutions (walkability, public transit, local restaurants) enables organizations to address sustainable travel without tackling the more challenging question of whether rotation patterns themselves align with climate commitments. This pattern suggests the industry needs frameworks for honest discussion about trade-offs rather than incremental destination-level improvements that leave the fundamental structure unchanged.

Conclusion: Association World in Transition

This report set out to understand the current state of sustainability in associations globally, two years after major national and global commitments were made—including Destination Canada's ambitious sustainability plan and the business events industry's pledge to achieve Net Zero by 2050. The findings reveal an industry that has moved decisively past debating whether sustainability matters, but remains caught in the challenging space between aspiration and implementation.

The data tells a story of selective progress. Some 66% of associations now rate sustainability as very or extremely important—up from 60% in 2023. Organizations have embedded sustainability into strategic planning (50%) and event planning procedures (62%), demonstrating commitment at the highest organizational levels.

Yet only 12% report sustainability efforts in annual reports, and only 20% include specific sustainability criteria in their RFPs. Just 24% still do not calculate their event carbon footprint—an improvement from 45% in 2023—but 19% have simply delegated this responsibility to hosts rather than building internal capacity.

The portrait that emerges is of an industry in transition. Associations genuinely care about sustainability—evident in high priority ratings, integration into planning and operational changes around waste, catering and social equity. However, they lack the necessary tools, clarity, confidence and frameworks to translate this care into systematic action, particularly in environmental dimensions where measurement and accountability remain underdeveloped.

The consistency between 2023 and 2025—identical top priorities, similar implementation hierarchies, persistent measurement gaps—suggests that without new catalysts, progress may stall at this level. Organizations have adopted practices that are relatively comfortable, while avoiding those requiring fundamental operational changes or transparent accountability.

This is neither cause for celebration nor despair. The question facing associations, destinations, meeting suppliers and industry leaders is whether this represents a temporary plateau on the journey toward comprehensive sustainability, or a stable status quo that will persist without significant external pressure or internal innovation.

We have a lot of work to do.





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