

**LEXIA.SOLUTIONS & IAVM:
RESULTS OF VENUE ACCESSIBILITY SURVEY
JULY 28, 2020**



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SURVEY OVERVIEW

Bauer Entertainment Marketing (BEM) developed and fielded a 10-question survey on behalf of Lexia.Solutions and International Venue Managers Association (IAVM) with the primary goal of learning more about how North American venue operators are currently and potentially serving their customers who use wheelchairs.

The following is a breakdown of IAVM's overall membership by title:

- General Manager, Executive Director: 12%
- Assistant General Manager, Director, Vice President: 34%
- Manager: 30%
- Coordinator: 7%
- Other: 17%

And below is IAVM overall membership makeup by venue type:

- Arenas: 22.57%
- Convention Centers: 22.03%
- Performing Arts Centers: 16.11%
- Stadiums: 8.43%
- Universities: 5.99%
- Complexes: 5.99%
- Theaters: 2.28%
- Event Center: 1.66%
- Fairground: 1.57%
- Parks & Recreation: 1.43%
- Other: 6.38%
- Unknown: 5.58%

BEM's survey was deployed on June 22, 2020 to IAVM members who reside in North America and do not have "sales" in their job title. Upon the survey's conclusion on July 3, 2020, we received 84 fully completed surveys. A significant number (42.9%) of these respondents have primary responsibility for their venue's wheelchair-accessible seating.

KEY FINDINGS

- A strong majority (81.0%) of North American venue operators believe that being fully accessible/ADA compliant is "extremely important" (10 out of 10). None of the respondents felt this aspect of their business was unimportant. This is reinforced by 100% of respondents indicating "7 out of 10" or higher to this question in the survey. Their responses imply that any resource that helps ensure and sustain compliance is worthy of serious consideration by venue operators.
- Despite the acknowledged importance of being ADA compliant by survey respondents, nearly one-third of venue operators (30.9%) revealed their venue is not fully ADA compliant (21.4%) or they are unsure of its status (9.5%). This confirms a significant need for ADA seating solutions and education about ADA seating policies.
- The majority (82.2%) of venue operators reported that just 10% or fewer of their total seats are currently accessible to guests using wheelchairs. Also, only 9.5% of venue operators stated that 30% or more of their total seats are currently accessible. It is important to note that ADA guidelines state the percentage of required accessible seats is based on the total number of seats in a venue. Depending on the type of facility and the overall number of seats, this percentage could fall between 1% and 5%. Although most venues meet this minimum wheelchair-accessible seating requirement, there exists opportunity for 97.6% of venues to add more ADA seating so they can attract more guests who use wheelchairs as well as their companions to attend their events.

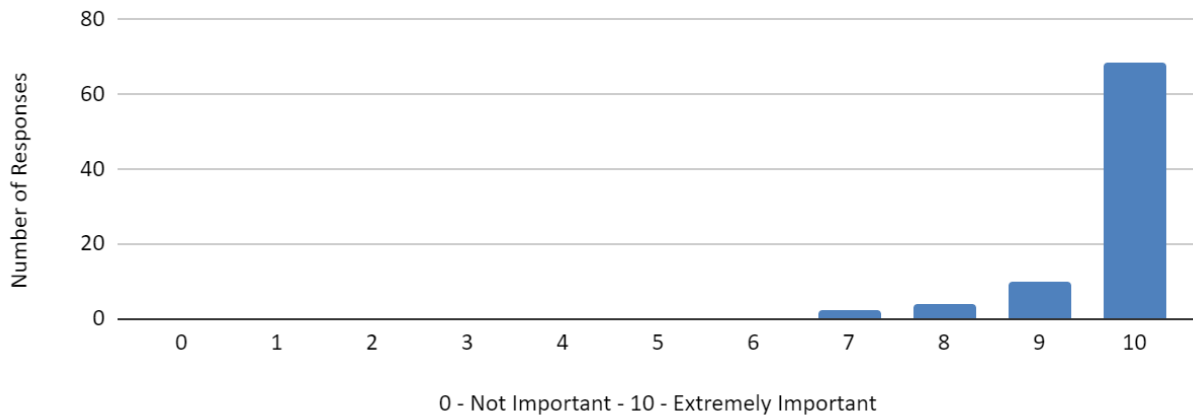
- 86.9% of respondents reported that guests using wheelchairs are limited to certain seating locations. Also, 59.5% of the operators indicated that certain seating sections are not wheelchair accessible. Per the ADA, venues must provide individuals with disabilities a choice of seating locations and viewing angles that are substantially equivalent to, or better than, the choice of seating locations and viewing angles available to other guests. This survey's responses indicate significant need to establish more equivalent seating in venues for guests who use wheelchairs.
- Among the respondents whose venues include luxury suites (38.0%), more than one-third (34.4%) have suites that are not currently wheelchair accessible. The ADA states that the requisite number of wheelchair spaces and companion seats in suites must equate to 20% of overall luxury suite seats. Our survey's findings reveal an immediate, substantial need and opportunity for wheelchair-accessible seating compliance in suites.
- The ADA strongly encourages 3 companion seats (fixed or movable, adjacent, and on the same level) be provided for each wheelchair space, but requires a minimum of 1. Furthermore, companion seats also must be equivalent in size, quality, and comfort to other seats in the area. Only 33.3% of respondents have 3 or more companion seats per each accessible seat at their venue. Although nearly all (98.8%) have at least 1 companion seat available, it is clear that most venues can do more to provide guests in wheelchairs the opportunity to experience events with their friends, family, and co-workers.
- 76.2% of respondents stated they have invested in structural modifications during the past five years to become or remain ADA compliant. Nearly half (45.2%) of respondents spent less than \$100k. However, a significant percentage (19.1%) have invested more than \$100k, including 4.8% who have invested more than \$1M. This data indicates motivation and financial resources to improve access and reach compliance.
- Regarding various ways that a venue's communications accommodate guests who use wheelchairs, the most common tactics are training staff (89.3%) and presenting related information at time of ticket purchase (77.4%). The least common tactics were interior signage (38.1%) and exterior signage (46.4%). In general, data indicates that communicating with guests who use wheelchairs is highly valued by venues. Most have the opportunity to provide more visible directions to accessible parking spaces, passenger drop-off points, transit stops, and exits inside and outside the facilities.
- Among ways that a venue's logistics accommodate guests in wheelchairs, the most used tactics are accessible restrooms with grab bars, raised toilet seats, and lowered sinks/hand driers (91.7%); curb cuts in sidewalks near entrances (88.1%); and smooth, level flooring (84.5%). By far, the tactic least implemented (36.9%) by operators is an elevated platform to view shows. In context with other responses in this survey, it is reasonable to presume if operators had an affordable, elevated platform to offer guests in wheelchairs, they would do it.

CONCLUSION

These survey results indicate that wheelchair-accessible seating is a bona fide problem/opportunity and thus a timely need for many venue operators. Investing in ADA seating can help expand the market for and enhance the brand of venues. Furthermore, facilities that are not currently ADA compliant can avoid significant reputational and financial penalties by taking steps to become more accessible. Doing nothing may have a much higher cost later than investing in a proven solution now.

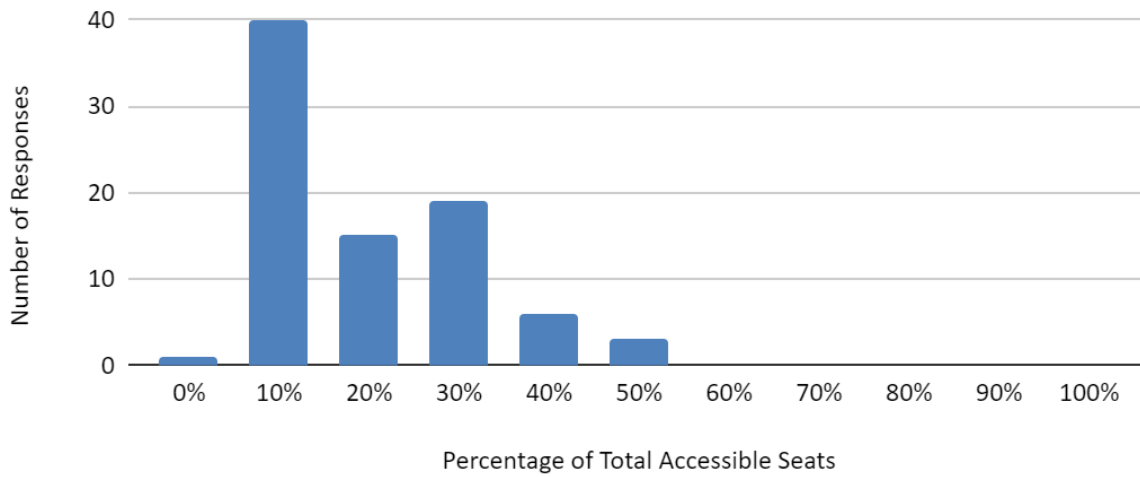
SURVEY DATA

How important is it that your venue be fully accessible/ADA (Americans with Disabilities Act) compliant?



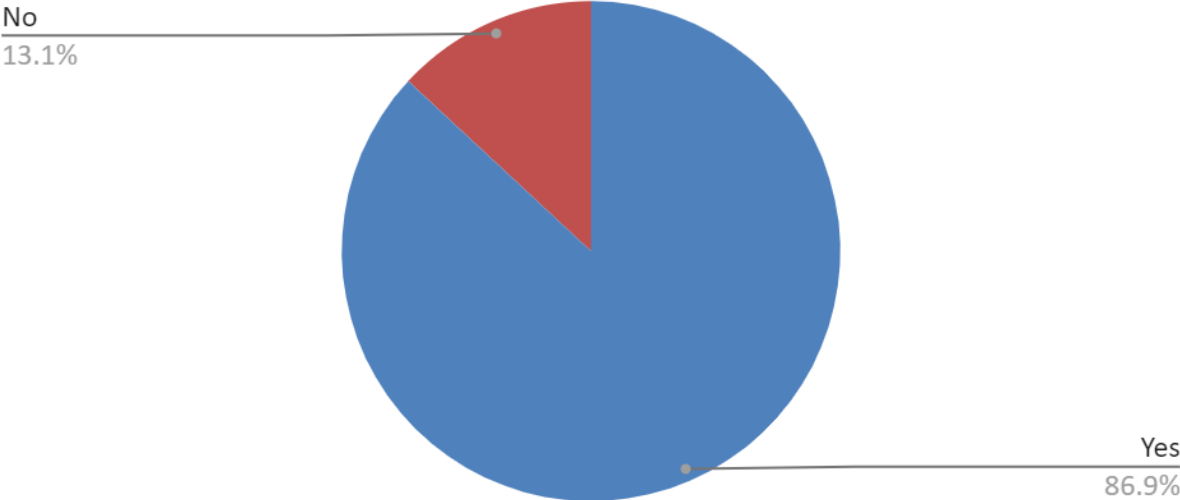
Q1 How important is it that your venue be fully accessible/ADA (Americans with Disabilities Act) compliant? (0 - Not Important - 10 - Extremely Important)		
	<i>Number of Responses</i>	<i>%</i>
0	0	0.0%
1	0	0.0%
2	0	0.0%
3	0	0.0%
4	0	0.0%
5	0	0.0%
6	0	0.0%
7	2	2.4%
8	4	4.8%
9	10	11.9%
10	68	81.0%
<i>Total Responses</i>		84

Approximately what percentage of total seats at your venue are accessible to guests who use wheelchairs?



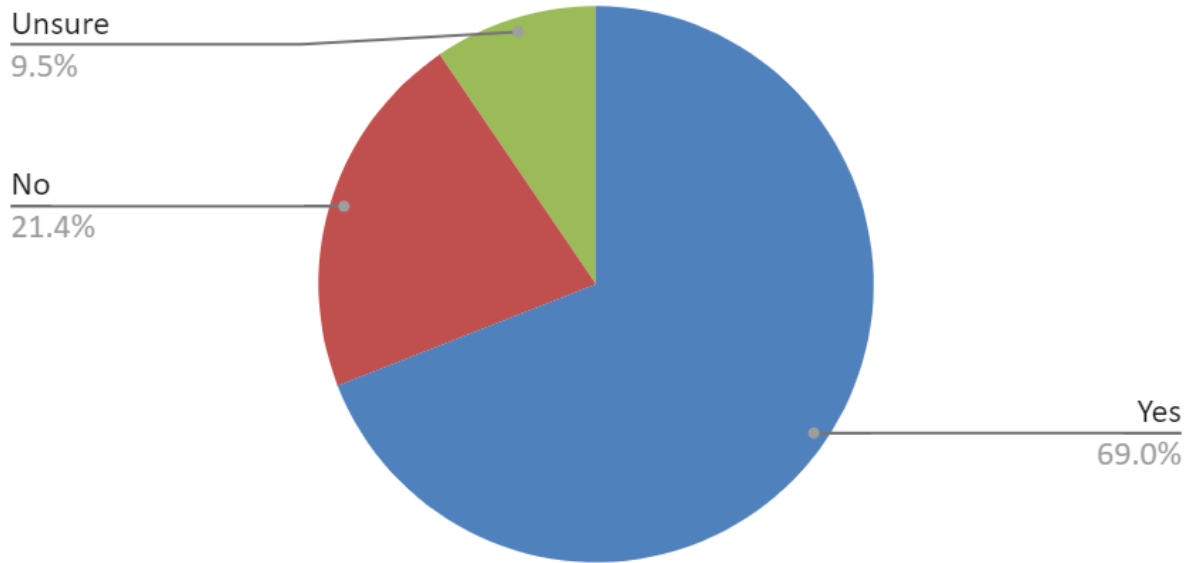
Q2. Approximately what percentage of total seats at your venue are accessible to guests who use wheelchairs?		
	<i>Number of Responses</i>	<i>%</i>
1 = 0%	3	3.6%
2 = 10%	66	78.6%
3 = 20%	7	8.3%
4 = 30%	2	2.4%
5 = 40%	0	0.0%
6 = 50%	0	0.0%
7 = 60%	2	2.4%
8 = 70%	1	1.2%
9 = 80%	1	1.2%
10 = 90%	0	0.0%
11 = 100%	2	2.4%
<i>Total Responses</i>	84	

Are guests of your venue who use wheelchairs limited to certain seating locations?



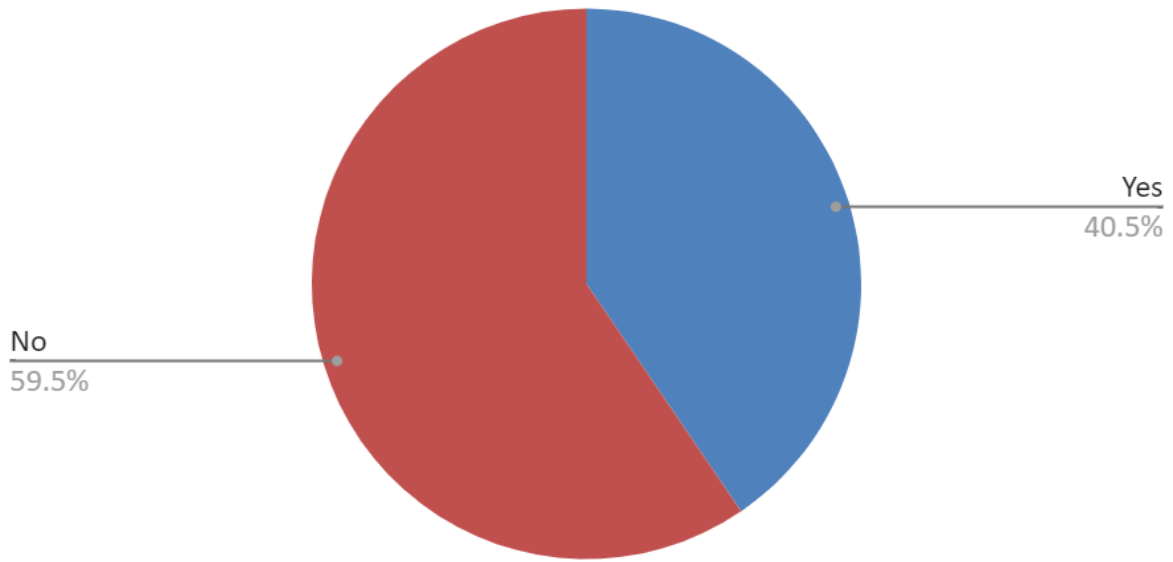
Q3 Are guests of your venue who use wheelchairs limited to certain seating locations?		
	<i>Number of Responses</i>	<i>%</i>
1 = Yes	73	86.9%
2 = No	11	13.1%
<i>Total Responses</i>	84	

To the best of your knowledge, is your venue fully compliant with the ADA requirements?



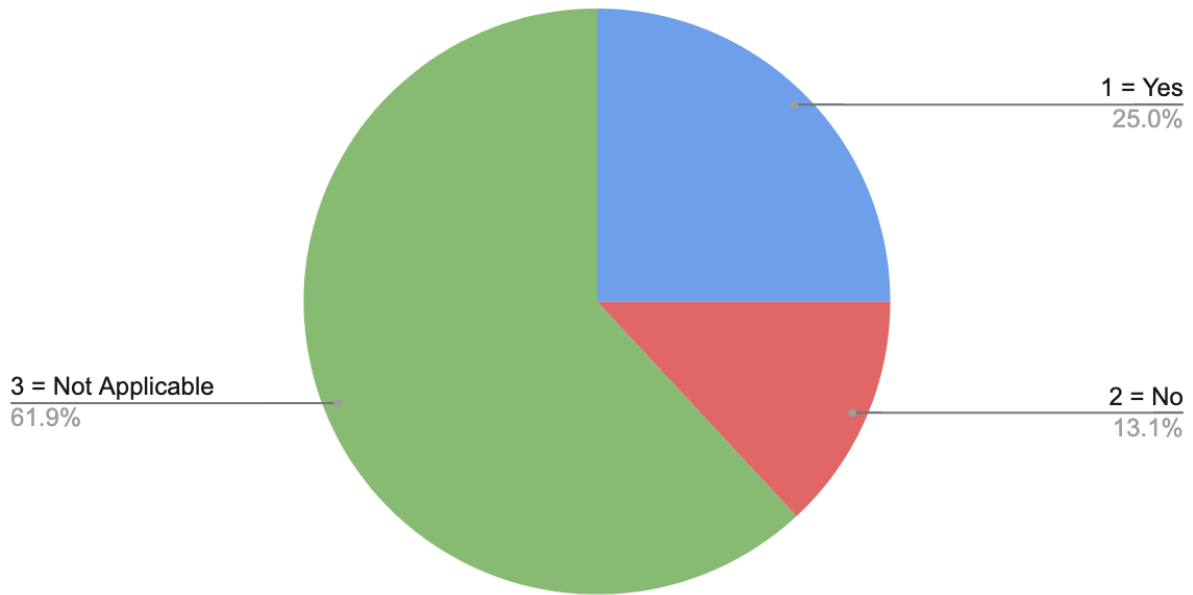
Q4. To the best of your knowledge, is your venue fully compliant with the ADA requirements?		
	<i>Number of Responses</i>	<i>%</i>
1 = Yes	58	69.0%
2 = No	18	21.4%
3 = Unsure	8	9.5%
<i>Total Responses</i>	84	

Is there wheelchair-accessible seating in every section of your venue?



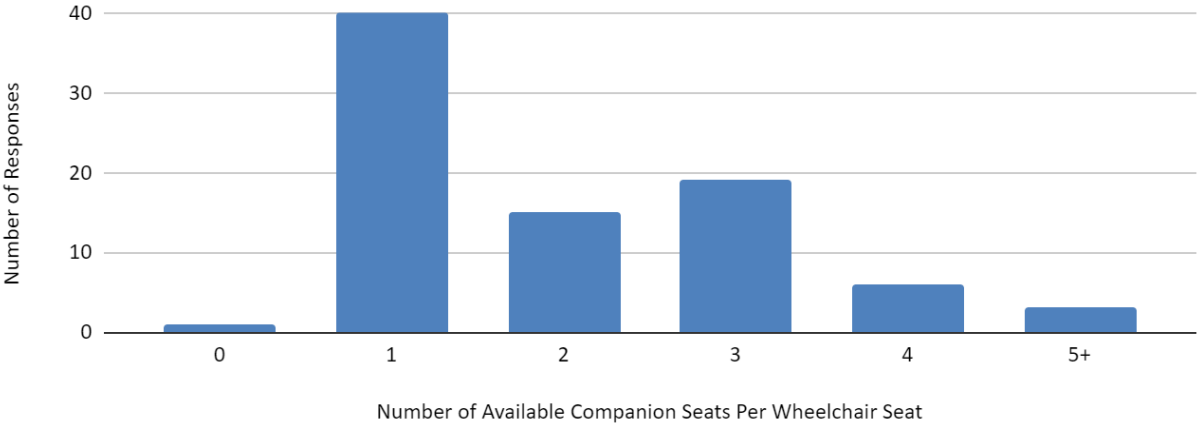
Q5 Is there wheelchair-accessible seating in every section of your venue?		
	<i>Number of Responses</i>	<i>%</i>
1 = Yes	34	40.5%
2 = No	50	59.5%
	<i>Total Responses</i>	84

Is there wheelchair-accessible seating in all of your venue's suites?



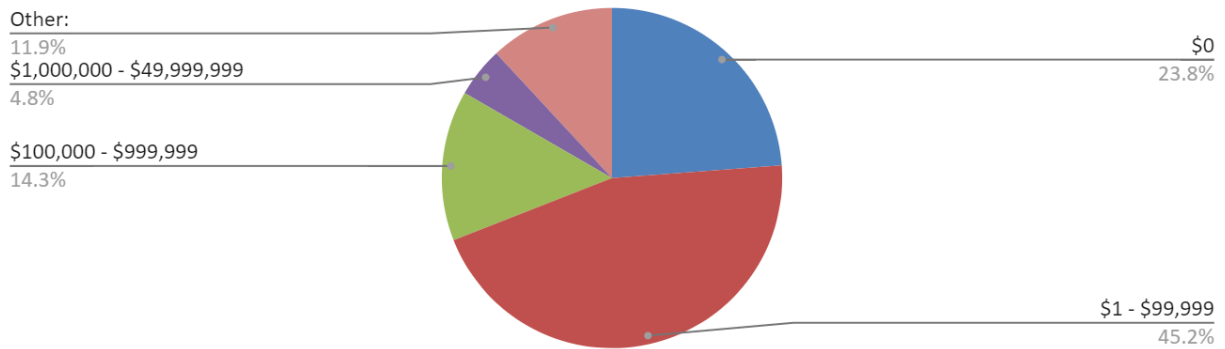
Q6 Is there wheelchair-accessible seating in all of your venue's suites?		
	<i>Number of Responses</i>	<i>%</i>
1 = Yes	21	25.0%
2 = No	11	13.1%
3 = Not Applicable	52	61.9%
<i>Total Responses</i>	84	

How many companion seats are available per wheelchair seat?



Q7 How many companion seats are available per wheelchair seat?		
	<i>Number of Responses</i>	<i>%</i>
0	1	1.2%
1	40	47.6%
2	15	17.9%
3	19	22.6%
4	6	7.1%
5+	3	3.6%
	Total Responses	84

Approximately how much has your venue invested in structural modifications...



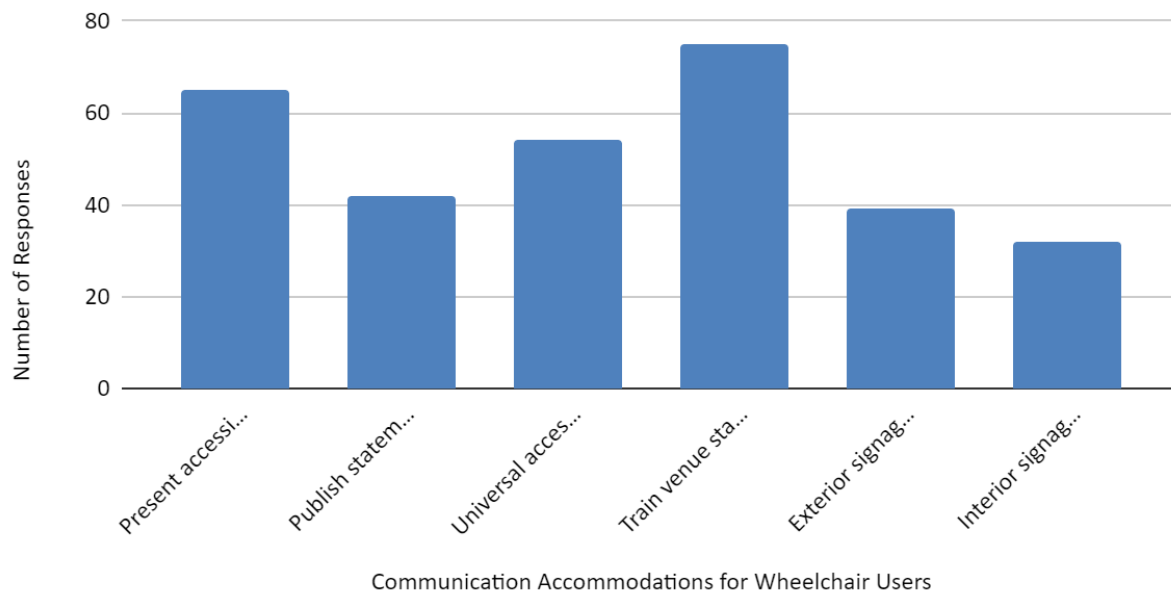
Other Comments:

<ul style="list-style-type: none"> • “unknown”
<ul style="list-style-type: none"> • “Not sure. Did a full renovation of the Arena 2-3 years ago and designed to new ADA rules with 4 companion seats but I think the 0.5% number of wheel chair locations.”
<ul style="list-style-type: none"> • “Unsure”
<ul style="list-style-type: none"> • “Our venue is six years old. We were built ADA compliant”
<ul style="list-style-type: none"> • “N/A”
<ul style="list-style-type: none"> • “We were compliant already”
<ul style="list-style-type: none"> • “We are planning to invest in more accommodations as part of our capital improvements with our current campaign.”
<ul style="list-style-type: none"> • “1.5 million 7 years ago”
<ul style="list-style-type: none"> • “Unsure”
<ul style="list-style-type: none"> • “Our building is just 10 years old”

Q8 Approximately how much has your venue invested in structural modifications during the past 5 years to be compliant with ADA requirements?

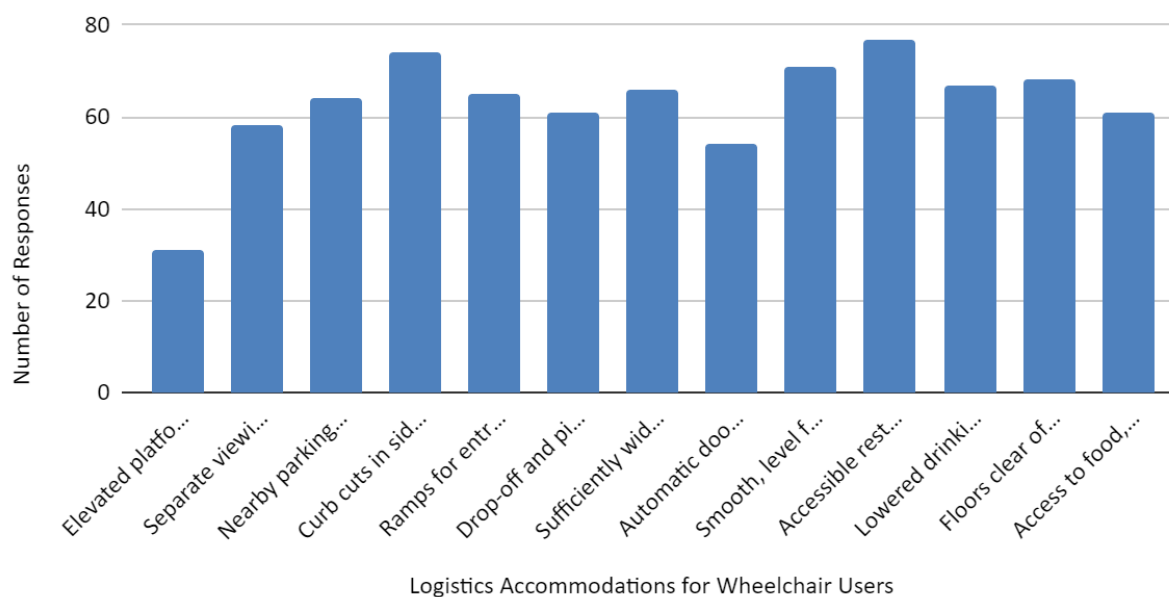
	<i>Number of Responses</i>	<i>%</i>
\$0	20	23.8%
\$1 - \$99,999	38	45.2%
\$100,000 - \$999,999	12	14.3%
\$1,000,000 - \$49,999,999	4	4.8%
\$50,000,000 - \$99,999,999	0	0.0%
\$100,000,000 - \$149,999,999	0	0.0%
\$150,000,000+	0	0.0%
Other:	10	11.9%
Total Responses	84	

In what ways do your venue's communications accommodate guests who use wheelchairs?



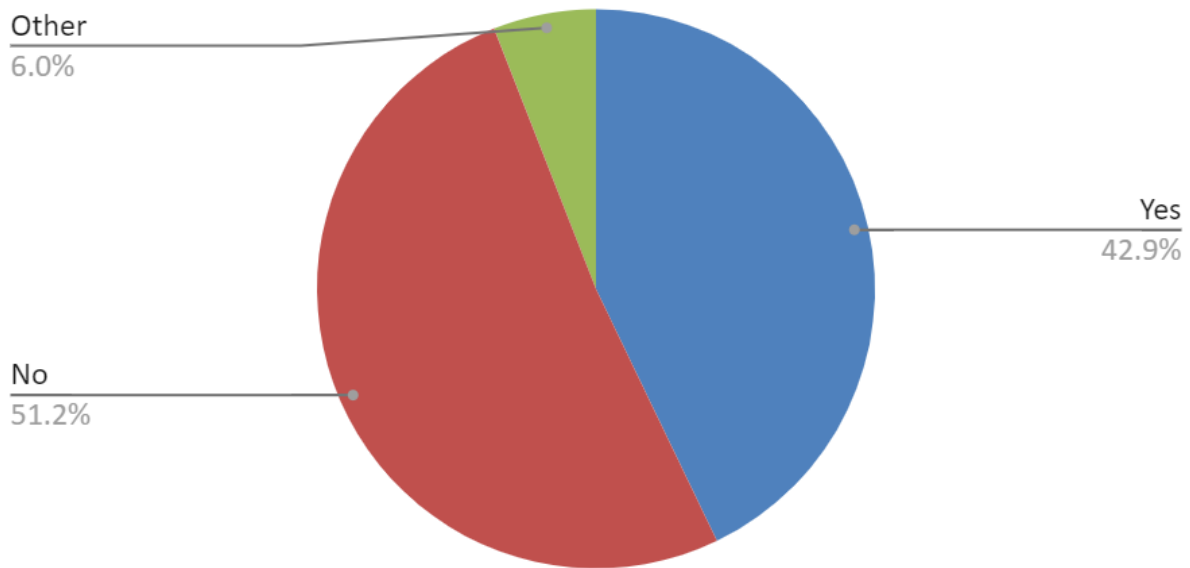
Q9 In what ways do your venue's communications accommodate guests who use wheelchairs? (Check all that apply.)		
	<i>Number of Responses</i>	<i>%</i>
Present accessibility-related information when purchasing tickets at the venue and/or online	65	77.4%
Publish statements affirming your commitment to accessibility for all	42	50.0%
Universal accessibility symbol or icon (i.e., individual seated in a wheelchair) appears on venue websites, social media pages, brochures, handouts, ads, schedules, etc.	54	64.3%
Train venue staff on how to approach, accommodate, and assist guests who use wheelchairs	75	89.3%
Exterior signage includes directions to accessible parking spaces, passenger drop-off points, transit stops, entrances, and gates	39	46.4%
Interior signage includes directions to accessible parking spaces, passenger drop-off points, transit stops, and exits	32	38.1%
<i>Total Responses</i>	84	

In what ways do your venue's logistics accommodate guests in wheelchairs?



Q10 In what ways do your venue's logistics accommodate guests in wheelchairs? (Check all that apply.)		
	<i>Number of Responses</i>	<i>%</i>
Elevated platform to view the show	31	36.9%
Separate viewing area or reserved seating with a line of sight to the stage comparable to that for other guests	58	69.0%
Nearby parking options that accommodate vans with raised roofs	64	76.2%
Curb cuts in sidewalks near venue entrances	74	88.1%
Ramps for entrance to and exit from the venue	65	77.4%
Drop-off and pick-up locations close to accessible parking and/or public transportation	61	72.6%
Sufficiently wide doors, elevators, escalators, turnstiles, security desks, and hallways	66	78.6%
Automatic doors at entrances and exits	54	64.3%
Smooth, level flooring	71	84.5%
Accessible restrooms (i.e., entrance doors, stall doors, grab bars, raised toilet seats, lowered sinks/hand dryers/soap dispensers/towel dispensers)	77	91.7%
Lowered drinking fountains and/or available cups	67	79.8%
Floors clear of barriers, obstacles, and trip hazards	68	81.0%
Access to food, beverage, and merchandise counters	61	72.6%
<i>Total Responses</i>	84	

Do you have primary responsibility for determining your venue's wheelchair-accessible seating?



Comments:

- “Another division within the organization.”
- “Each event manager will work directly with the client and client's guests”
- “In show mode it is my duty to make every patron comfortable and have access to seating suiting to their needs.”
- “Has to be approved through University”

Q11 Do you have primary responsibility for determining your venue's wheelchair-accessible seating?	Number of Responses	%
1 = Yes	36	42.9%
2 = No	43	51.2%
3 = Other	5	6.0%
Total Responses	84	