

**TREND REPORT #1**  
**FULL RESEARCH REPORT**

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# **AN INCONVENIENT BOOTH™**

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**THE ECONOMIC IMPACT OF THE GREEN  
MOVEMENT ON THE TRADE SHOW INDUSTRY**



**PRODUCED BY EXHIBITOR MAGAZINE GROUP**

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# I. White Paper

The following white paper was first published in the November 2007 issue of EXHIBITOR magazine. It presents aggregate results and data generated by the survey including comparisons of relevant findings across the exhibitor and supplier samples. For more detailed breakdowns, consult the full research report, beginning on page 17.

# A. Executive Summary

As interest in environmental issues continues to strengthen virtually around the world, the impact on business has been significant. The so-called “Green” movement is now firmly entrenched on the executive agenda at many, if not most, of the world’s largest and most influential companies, and organizations of all sizes are scrambling to revamp operations and product lines to comply with a growing mandate from customers, investors, and other stakeholders for more environmentally-friendly practices.

We have seen this movement begin to make inroads in the exhibit industry as well. In fact, in 2007, the exhibit industry experienced several Green-related firsts:

- ▶ The first eco-friendly exhibit system was introduced.
- ▶ The Exhibit Designers and Producers Association (EDPA) announced the formation of a committee to develop Green standards for trade show exhibit design and construction.
- ▶ The International Association of Exhibitions and Events (IAEE) announced a Green committee to address environmental issues in the industry.
- ▶ One of the largest players in the exhibition and event industry announced it has recycled more than 1 million square yards of carpet as part of its industry-wide recycling efforts.

Are these developments the first wave of a “Green Rush” that’s ready to make its mark on how exhibit products and services are produced, delivered, purchased, and used? Or are they nothing more than isolated actions of individual organizations and not reflective of any broader movement?

To try to answer these questions and identify the potential economic impact of the Green movement on the exhibit and trade show industry, EXHIBITOR embarked on an effort to take a comprehensive, objective look at the state of Green exhibiting from both sides of the industry: those supplying exhibit products and services, and the people and companies buying and using them. With the help of The Bloom Group, an international research firm, we launched the first initiative in what will be a series of ongoing research efforts: an in-depth survey of nearly 500 exhibit managers and other managers and executives at companies around the country, as well as more than 100 senior executives and sales and marketing managers at exhibit display and accessories suppliers.

We found there is considerable interest in Green exhibiting among both exhibitors and suppliers, and that interest has translated into small, measured steps toward adopting Green exhibiting options. We also found that interest in Green exhibiting options is likely to increase in the coming year, as is the percentage of trade show budgets that exhibitors will earmark for such products and services. A large percentage of suppliers expect to substantially increase the number and variety of Green alternatives they offer — in some cases, nearly doubling the percentage of their product line that represents Green options.

All told, the survey results indicate that an untapped market for Green exhibiting options does exist — to the tune of an estimated \$9.24 billion. But for that market to become a reality, exhibitors and suppliers alike first must overcome a number of obstacles that currently impede broader adoption of Green solutions across the industry.

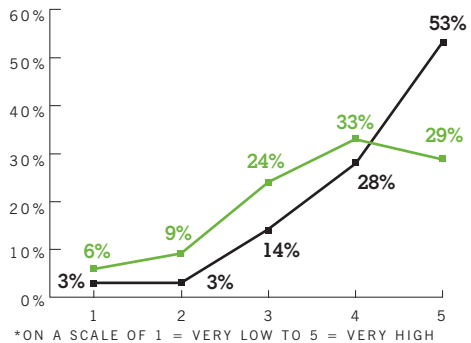
**An untapped market for Green exhibiting options does exist — to the tune of an estimated \$9.24 billion.**

**A large percentage of suppliers expect to substantially increase the number and variety of Green alternatives they offer — in some cases, nearly doubling the percentage of their product line that represents Green options.**

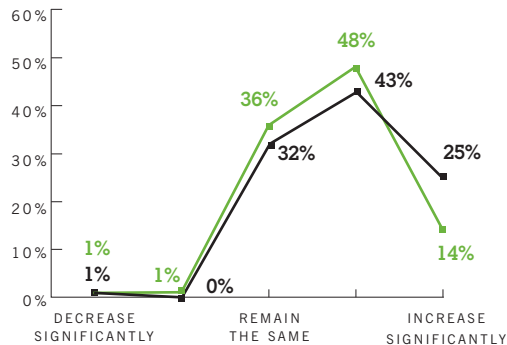
# Interest in Green Exhibiting Options is High and Growing

A majority of exhibitors (62 percent) and suppliers (81 percent) we surveyed reported that their personal interest in Green exhibiting options is high or very high (**Figure 1**). This upward trend is likely to continue, as 62 percent of exhibitors and 78 percent of suppliers believe their interest will increase somewhat or significantly in the next six to 12 months (**Figure 2**).

**FIGURE 1:**  
Current interest in Green exhibiting options is high among exhibitors and suppliers.\*

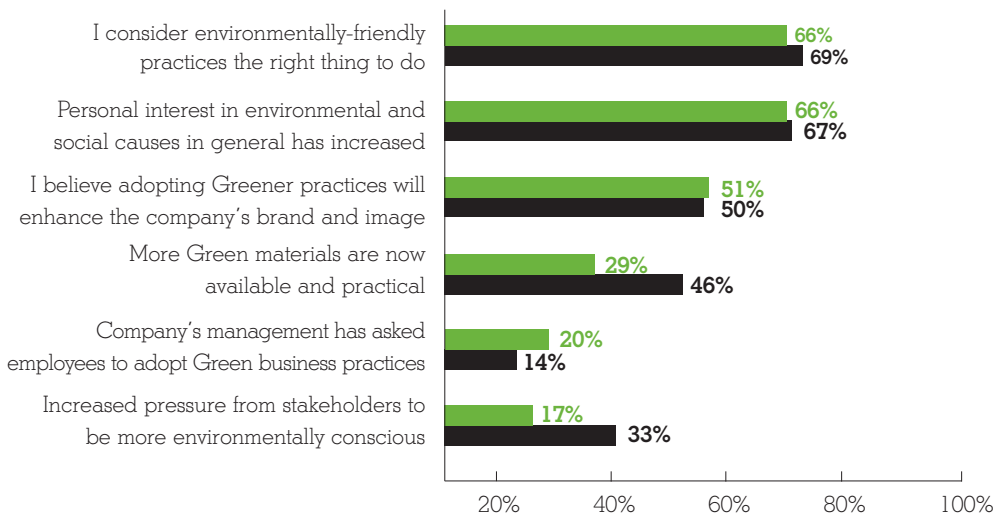


**FIGURE 2:**  
Interest in Green exhibiting options among exhibitors and suppliers is expected to grow in 2008.



Behind this growing interest are two principal drivers: the fact that respondents consider environmentally-friendly practices the right thing to do, and that respondents' personal interest in environmental issues and social causes has increased (**Figure 3**). These factors are consistent across both exhibitor and supplier samples. About half of each group said they are more interested in Green exhibiting options because they believe adopting Greener practices will enhance their company's brand and image. One-third of suppliers and 17 percent of exhibitors indicated their attention to Green exhibiting options has been raised because they've received increased pressure from investors, customers, and other stakeholders to be more environmentally friendly.

**FIGURE 3:**  
Exhibitors and suppliers cite personal interest as a major reason for increased interest in Green exhibiting options.



**62%** of exhibitors expect their interest in Green exhibiting will increase over the next 12 months.

**Key**  
Exhibitors  
Suppliers

**51%** of exhibitors believe adopting Greener practices will enhance their companies' brand and image.

**Key**  
Exhibitors  
Suppliers

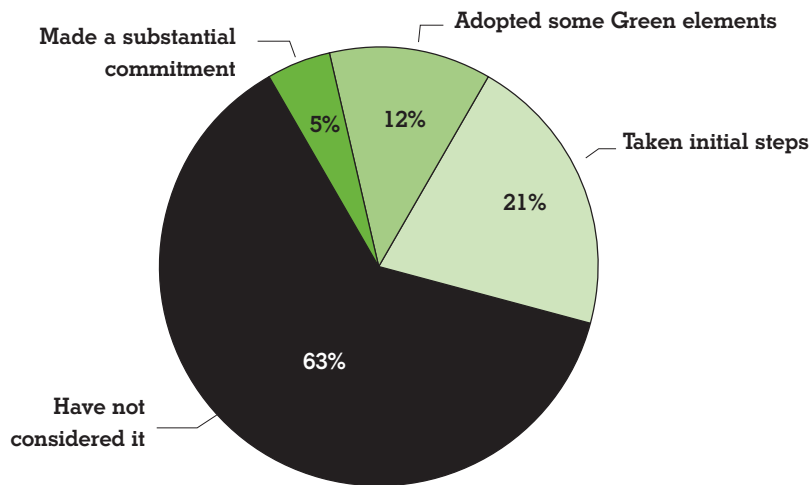
For some, the high level of personal interest has translated into active support of Green exhibiting options. We found that 35 percent of exhibitors and 59 percent of suppliers consider themselves a champion of Green exhibiting options at their companies. Compared with non-champions, champions are nearly unanimous in stating a high or very high personal interest in Green exhibiting (91 percent vs. 36 percent) and see themselves as strong proponents of more environmentally-friendly exhibit products and services.

## Adoption of Green Exhibiting Options has been Measured to Date but is Expected to Grow

With the generally high level of interest in Green exhibiting expressed by exhibitors and suppliers, one might expect a high adoption rate for Green exhibiting options. According to our survey, there has been some adoption of Green options, but because of the nascent nature of the Green movement in the exhibit industry, that adoption has been measured to date.

For instance, just under one-fourth of exhibitors said they personally have deliberately purchased a Green exhibit product or service (which could include anything from a booth property or graphics to lighting, carpeting, accessories, shipping, and pre- and post-show marketing materials). Furthermore, while 63 percent of exhibitors indicated that their companies haven't considered such a purchase, 21 percent reported their companies have taken initial steps in adopting Green exhibiting options, 12 percent said their companies have adopted Green exhibiting elements, and 5 percent said their companies have made a substantial commitment to Green exhibiting (*Figure 4*).

**FIGURE 4:**  
More than a third of exhibitors have taken steps toward adopting Green exhibiting options.



The pace of adoption appears poised to quicken in the near future, as more exhibitors earmark parts of their budgets for Green options. As noted in *Figure 5*, 58 percent of exhibitors today allocate some portion of their exhibit/display budgets to Green options — although in most cases, that portion is relatively small, with 37 percent of companies dedicating between 1 percent and 10 percent of their total exhibit-marketing budgets to spending on Green options. In 42 percent of the companies represented by exhibitor respondents, Green options account for 0 percent of the overall exhibit/display budget.

Yet, as *Figure 5* illustrates, that's all about to change, as exhibitors report plans to boost their investment in Green exhibiting options in the coming year. For example, the percentage of exhibitors saying they will allocate none of their budget to Green options drops from 42 percent today to 14 percent in 12 months. Similarly, the percentage of

The pace of adoption of Green exhibiting appears poised to quicken in the near future, as more exhibitors earmark parts of their budgets for Green options.

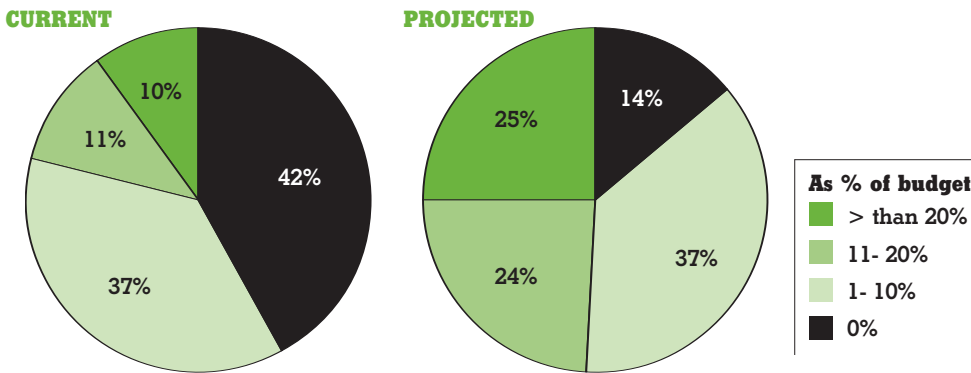
**38%** of exhibitors have already taken steps toward adopting Green exhibiting options.

Further demonstrating the untapped market potential for Green exhibiting is the fact that exhibitors, on average, believe approximately one-fourth of their total exhibit/display budget is theoretically convertible to Green options.



exhibitors who allocate between 11 percent and 20 percent of their budget to Green options is expected to rise from 11 percent today to 24 percent in one year.

**FIGURE 5:**  
The percentage of exhibitors' budgets allocated to Green options is expected to grow.

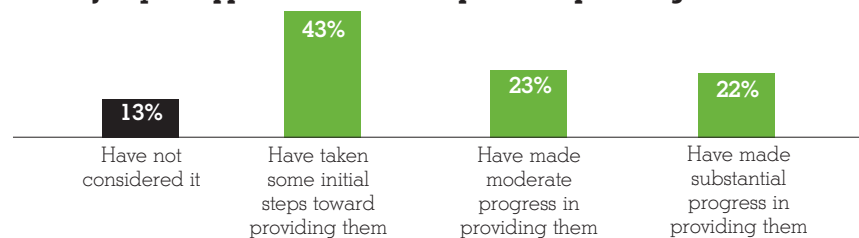


Some of this shift may be driven by the policies of the larger enterprises in which our exhibitor respondents work. We found that 46 percent of exhibitors' companies have some type of formalized Green initiative, which in 73 percent of those companies extends to the exhibit function. So while a strong personal interest in Green exhibiting options among exhibitors appears to be behind the increasing attention to Green, corporate policies encouraging environmentally-friendly practices could be spurring action on that front as well.

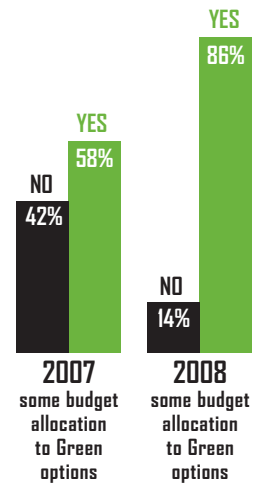
Further demonstrating the untapped market potential for Green exhibiting is the fact that exhibitors, on average, believe approximately one-fourth of their total exhibit-marketing budgets are theoretically convertible to Green options. According to rough extrapolations of our survey data, using figures from EXHIBITOR magazine's 2007 Salary Survey, Tradeshow Week's 200, and the Center for Exhibition Industry Research's third-annual CEIR Index, the annual industry-wide market potential for Green exhibiting options is a whopping \$9.24 billion. What's more, the majority of exhibitors believe it's not only theoretically possible to convert a quarter of their budgets to Green exhibiting options, but highly probable. In fact, 75 percent report that they expect to meet that theoretical target. If those respondents' expectations are accurate and representative, spending on Green exhibiting options could reach a minimum of nearly \$7 billion per year.

On the supplier side, measured progress also has been reported. Just under half of supplier respondents said their companies have a formalized Green initiative, which in 72 percent of those organizations is company wide. As shown in **Figure 6**, most suppliers have taken some initial steps toward providing Green exhibiting options (43 percent), while 45 percent have made either moderate or substantial progress in providing them. Thirteen percent have not considered offering Green options. On average, Green offerings account for 28 percent of suppliers' total product line, and for 58 percent of suppliers, Green options currently account for less than 10 percent of overall sales (with 22 percent of those companies reporting no revenue from Green exhibiting options).

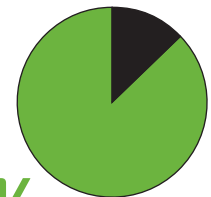
**FIGURE 6:**  
The majority of suppliers have taken steps toward providing Green exhibiting options.



**86%** of exhibitors anticipate allocating a portion of their 2008 exhibit-marketing budgets to Green exhibiting options.



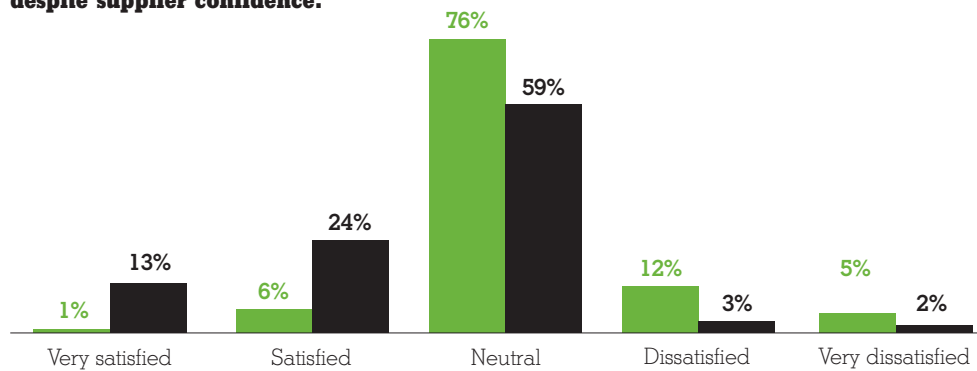
**46%** of exhibitors' companies have some type of formalized Green initiative, which in **73%** of those companies extends to the exhibit function.



**88%** of suppliers reported having made some progress in offering Green solutions.

Although most suppliers reported having made some progress in offering Green exhibiting options, it's apparently not enough for exhibitors. Overall, satisfaction among exhibitors with their suppliers' Green options is not high (**Figure 7**), with just 7 percent claiming to be satisfied or very satisfied and 76 percent professing to be neutral — suggesting that suppliers have some work to do if they want to tap into growing exhibitor demand for Green options. Interestingly, as **Figure 7** shows, suppliers seem to have overestimated clients' satisfaction with their Green offerings. Thirty-seven percent of suppliers said their clients were either satisfied or very satisfied with their Green exhibiting options while 59 percent thought they were neutral and 5 percent believed they were dissatisfied or very dissatisfied.

**FIGURE 7:**  
**Exhibitors are not currently satisfied with suppliers' Green exhibiting options, despite supplier confidence.**



\*PERCENTAGE OF EXHIBITORS SATISFIED WITH SUPPLIERS' GREEN OFFERINGS  
 \*\*PERCENTAGE OF SUPPLIERS INDICATING HOW SATISFIED THEY THINK THEIR CLIENTS ARE WITH THEIR GREEN OFFERINGS

Only **7%** of exhibitors indicated they were satisfied with suppliers' Green offerings.

**Key**  
 ■ Exhibitor Satisfaction\*  
 ■ Suppliers' Perception of Their Clients' Satisfaction\*\*

## Price is the Primary Obstacle to Broader Adoption

Clearly, Green exhibiting options have begun attracting exhibitors' attention, and in some companies, their money as well. But it's evident that something is preventing broader adoption of Green exhibiting options today, and according to exhibitors, that something can be summed up in one word: price.

We asked respondents if they would be willing to adopt Green options if those options performed as well as and cost the same as traditional options. An overwhelming 89 percent said they would. So Green appears to be the preferred option in a scenario where all things (including price) are equal.

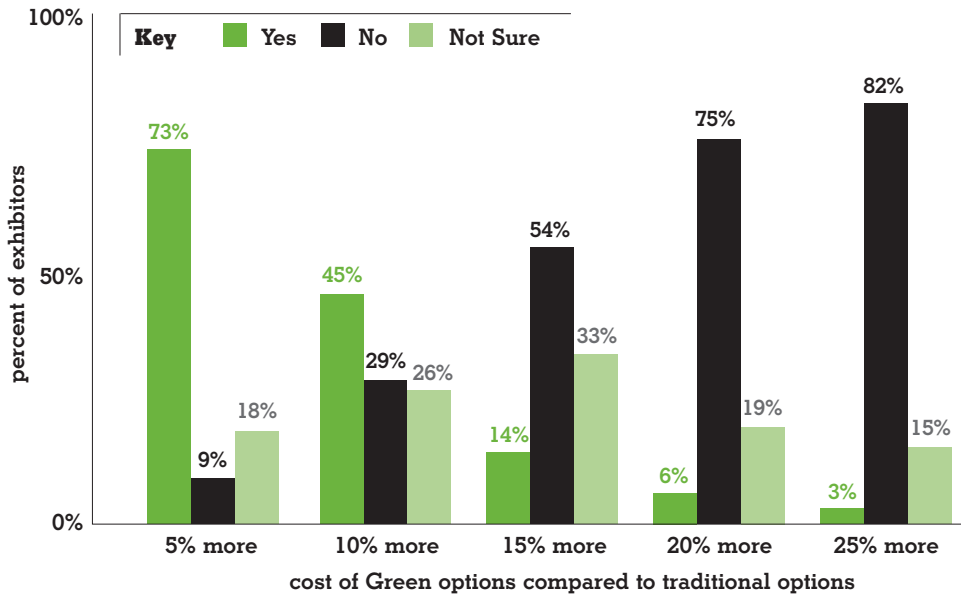
However, when certain price premiums were attached to Green options (with performance still assumed to be equal), support declined precipitously (**Figure 8**). If Green options theoretically cost 5 percent more than traditional options, 73 percent of exhibitors would still make the switch. However, bump the premium to 10 percent, and support erodes to just 45 percent. At a 15-percent premium, only 14 percent of exhibitors would switch — a figure that falls to 6 percent and 3 percent, respectively, when the premium reaches 20 percent and 25 percent.

Judging from these results, there is a clear price premium threshold among exhibitors that's somewhere between 5 percent and 10 percent. And that threshold is far exceeded by Green options currently available — both in the minds of exhibitors and on the price tags of actual products. When asked what they expect to pay for Green options today, exhibitors on average said approximately 23 percent more than traditional options. In reality, according to suppliers' responses, Green options actually cost an average of 26 percent more than traditional options.

**89%** of exhibitors would be willing to adopt Green options if those options performed as well as and cost the same as traditional exhibiting options.

**FIGURE 8:**

**The majority of exhibitors are willing to pay a small premium for Green exhibiting options.**



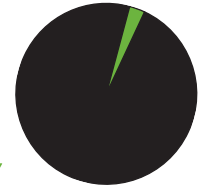
These findings provide considerable evidence that price thus far has been an inhibitor to more widespread adoption of Green exhibiting options. And until the price gap between Green and traditional options is reduced to below exhibitors' psychological threshold, adoption is likely to remain slow among all but the most zealous environmental enthusiasts.

## Other Significant Obstacles Exist

While the cost of Green exhibiting options is a major impediment to exhibitors' adoption of Green options, other significant obstacles exist (**Figure 9**). To identify which might be more influential in suppressing the adoption of Green options, we presented exhibitors and suppliers with a list of eight potential obstacles and asked participants to rate them in terms of how significant a stumbling block each is, using a scale of 1 (not at all an obstacle) to 7 (very significant obstacle).

Not surprising given the discussion in the preceding section, the generally higher prices of Green options compared with traditional options was tops on the list, with a mean rating of 5.33 among exhibitors and 5.25 among suppliers. The second-largest obstacle among all exhibitor respondents was a lack of variety in Green materials currently available, which received a mean rating of 4.61. Close behind lack of variety was a somewhat related issue, too small of a supplier pool providing Green options (4.56), followed by lack of metrics to quantify the business impact of Green exhibiting (4.49), and lack of consensus on what constitutes Green exhibiting (4.34). Concern over whether Green options would not perform as well as traditional options and management's general disinterest in Green exhibiting options were seen by exhibitors as the least-significant obstacles to broader adoption of Green exhibiting.

For their part, suppliers had virtually identical views on what was preventing their clients from showing stronger tangible support for Green options (**Figure 9**). In only two instances was the gap between the mean ratings of the two groups greater than .5: Suppliers thought general disinterest among exhibitors' management and lack of consensus on what constitutes Green exhibiting were greater obstacles than exhibitors did. At least when it comes to obstacles, suppliers appear to understand their clients' concerns very well.



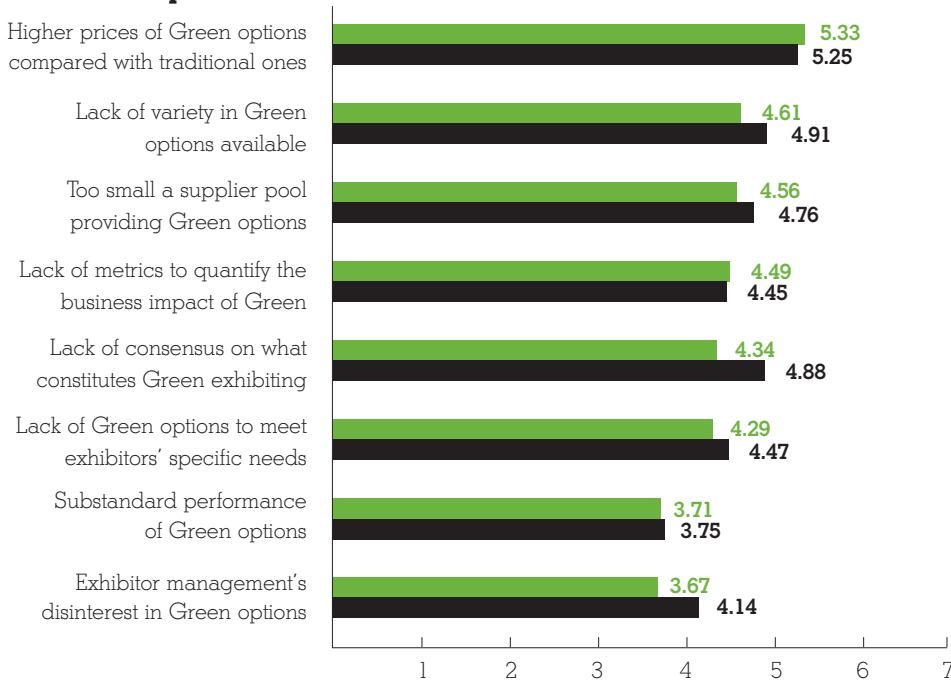
**3%** of exhibitors are willing to pay a premium of 25 percent or more for Green exhibiting options, while vendors report that Green products, on average, cost 26 percent more than traditional options.

There is a clear price-premium threshold for Green exhibiting options, and that's somewhere between 5 percent and 10 percent.

The second-largest obstacle to the adoption of Green exhibiting options is a lack of variety in Green materials currently available.

However, while exhibitors generally did not consider management disinterest in Green exhibiting a major obstacle, it's hard to ignore a separate survey finding: Only 35 percent of exhibitors described their company's level of interest in Green options as high or very high, with most indicating it was either neutral or low to very low. While such an interest level doesn't constitute an obstacle per se, it arguably could make it more difficult for an exhibit manager who would like to go Green to justify the additional costs that Green options would entail.

**FIGURE 9:**  
**The lack of variety in available Green options is the second-largest obstacle to increased adoption.\***



\*MEAN RATING ON A SCALE OF 1=NOT AT ALL AN OBSTACLE AT ALL TO 7=VERY SIGNIFICANT OBSTACLE

Another obstacle seems to be one that could be overcome with more effective marketing by suppliers. Nearly half of all exhibitors (45 percent) said they don't know if their suppliers provide Green exhibiting options, indicating suppliers could do a much better job of communicating what Green offerings are available.

The preceding illustrates what's preventing exhibitors from adopting Green options. But suppliers have their own set of challenges — some of which are related to exhibitors' issues — that are preventing them from offering a greater array of Green options. We asked supplier representatives to do a similar rating of a set of six obstacles to their ability to offer more Green alternatives to their clients, using the same scale of 1 (not at all an obstacle) to 7 (very significant obstacle). Four of the six obstacles finished almost even at the top of the list with a mean rating of around 5.00: higher overall cost of Green options, insufficient availability of Green options, lack of knowledge about available Green options, and lack of consensus on what constitutes a Green or sustainable option. The remaining two — increased lead time for sourcing Green options (4.30) and inferior performance of Green products (3.83) — finished well behind the leaders.

Indeed, after price, sourcing seems to be a major impediment for suppliers. According to 77 percent of supplier executives, there are too few suppliers of Green raw materials or Green products they source, which ostensibly makes it

Nearly half of all exhibitors (45 percent) said they don't know if their suppliers provide Green options, indicating suppliers could do a much better job of communicating what Green offerings are available.

**Key**  
■ Exhibitors  
■ Suppliers

Suppliers have their own set of challenges — some of which are related to exhibitors' issues — that are preventing them from offering a greater array of Green options.

difficult for suppliers to populate their product lines with more Green options that could be attractive to exhibitors. Furthermore, 75 percent of supplier executives would prefer a greater variety of Green options available from their suppliers, indicating the selection from which they must currently choose is too limited.

## **There is a Substantial Disconnect Between Exhibitors and Vendors on What Constitutes Green**

In some respects, one of the most significant obstacles to broader adoption of Green exhibiting options is that there's little agreement on what is truly Green. There are many ways both exhibitors and suppliers define Green, and those definitions are largely driven by what's important to each individual. Is it the fact that the product is recyclable? Is it that the product was made in a factory that produces no harmful emissions or waste? Is it that the product is more efficient to ship, thus saving gas?

To get a sense for what exhibitors and suppliers consider the defining characteristics of a Green exhibiting option, we asked them to rate a list of 11 potential Greenness factors. The results show that, for exhibitors, being Green is more about the product than the process (**Figure 10**). In other words, when deciding what's Green, exhibitors care less about whether or not the supplier's operations are environmentally friendly and more about the materials used to make the product itself.

For example, the top-rated factor for determining a product's Greenness is that the product is designed in such a way that it's more efficient to ship. Arguably, this factor could be more about the exhibitor saving money on shipping than about being more environmentally friendly. Nonetheless, the factor still involves the product itself.

The next two factors involve the raw materials from which a product is made: whether the product has any toxic or harmful components or ingredients and whether the product is made from materials that are endangered or in short supply. Related to the top factor is the fourth-rated factor, which is the extent to which a product has a sustainable design that promotes reuse of the components — for instance, a booth property that doesn't end up in a landfill when its useful life is over, but comprises components that could find a role as part of a new exhibit.

Fifth on the list of Greenness factors is whether the product is designed to consume less material overall, followed by two factors that are most commonly associated with Green options: the extent to which the product is recyclable and how much of the product is made from recycled materials.

At the bottom of the list are factors related to such things as how much waste from its operations a manufacturer reclaims, how efficient and non-polluting a manufacturer's operations are, how well a manufacturer conserves energy and water, and whether a manufacturer uses hybrid or more fuel-efficient vehicles as part of its operations. While these factors are not unimportant, they are comparatively lower on exhibitors' lists of what they think constitutes a Green product.

Suppliers and exhibitors were not aligned, however, in terms of the Greenness factors that influenced exhibitors' decisions to purchase Green exhibiting options (**Figure 10**). In fact, suppliers consistently underestimated the importance that exhibitors placed on each of the 11 factors we studied — especially six of them: products are made from recycled materials; products are recyclable themselves; products are designed to consume less material overall; suppliers use hybrid or more fuel-efficient vehicles; suppliers' manufacturing process consumes less energy

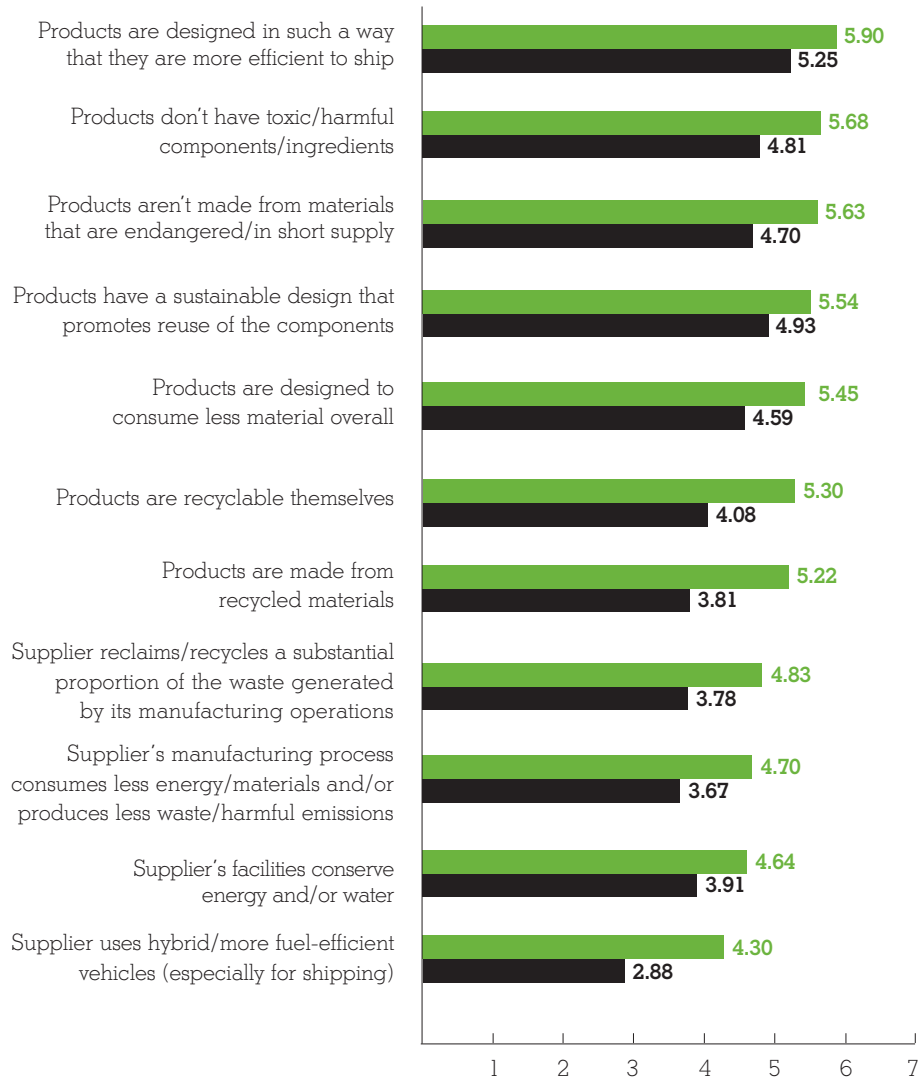
**When deciding what's Green, exhibitors care less about how environmentally friendly the operations are of the company that produced the product and more about the material used to make the product.**

**Exhibitors' top-rated factor for determining a product's Greenness is that the product is designed in such a way that it's more efficient to ship.**

**Suppliers and exhibitors were not aligned in terms of the Greenness factors that influenced exhibitors' decisions to purchase Green exhibiting options.**

or materials or produces less waste; and suppliers reclaim or recycle a substantial portion of the waste generated by their manufacturing operations. The message in these findings is that before vendors can effectively develop, market, and sell Green exhibiting options, they need to be sure what they consider Green matches the way their clients view the issue.

**FIGURE 10:**  
**Product makeup and design are among the top-rated factors in determining a product's Greenness.\***



\*MEAN RATING ON A SCALE OF 1=NOT AT ALL IMPORTANT AT ALL TO 7=EXTREMELY IMPORTANT

Suppliers consistently underestimated the importance exhibitors placed on each of the Greenness factors we studied.

**Key**  
■ Exhibitors  
■ Suppliers

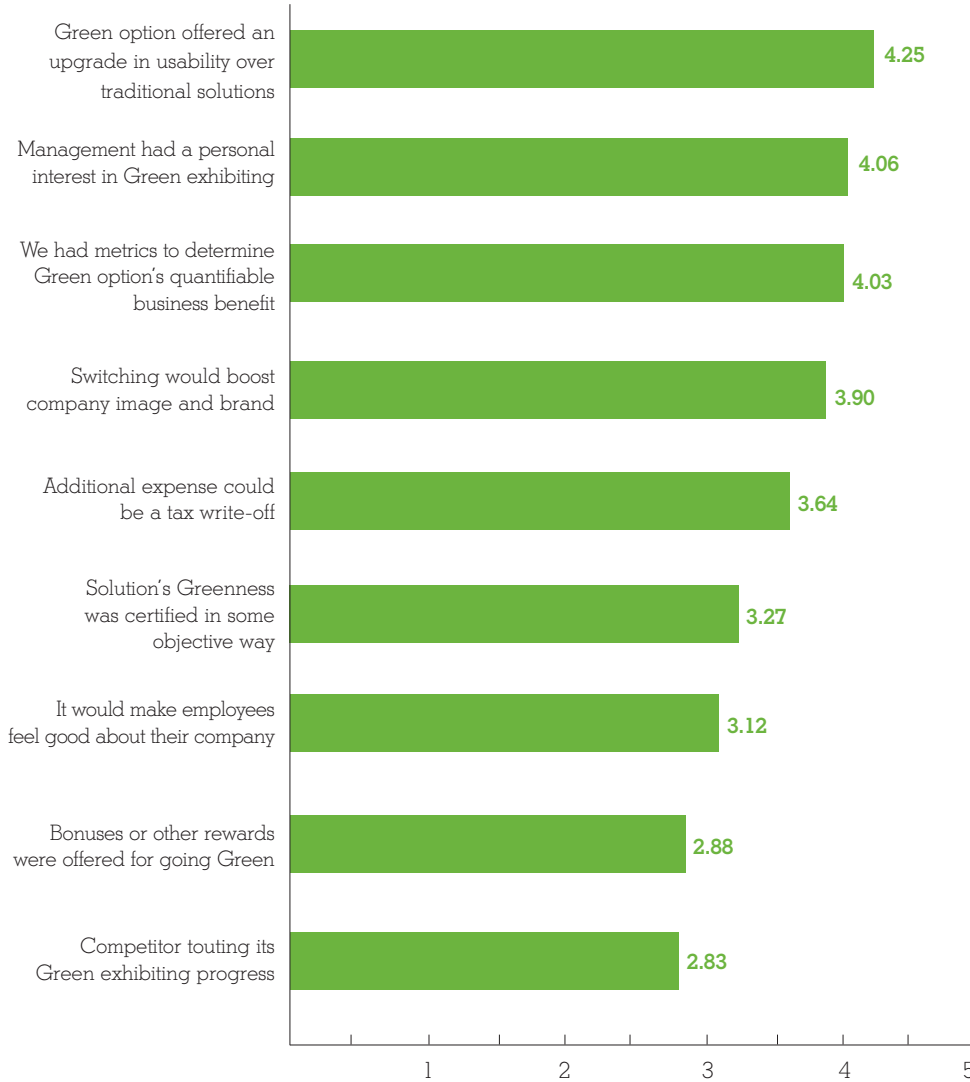
## Several Incentives Could Influence Exhibitors to Switch to Green Options

Short of eliminating the cost differential between Green options and traditional options, exhibitors identified several factors that could help convince them to switch to a Green option that performed as well as a traditional option but cost 10 percent more (Figure 11). The most-influential factor was an eminently practical one: if the Green options offered an upgrade in usability over traditional options in some important way, such as a longer life or more flexible design.

Exhibitors identified several factors that could help convince them to switch to a Green option that performed as well as a traditional option but cost 10 percent more.

The next-largest factor was if management had a personal interest in Green exhibiting, followed by having metrics that could demonstrate that Green options generate a quantifiable benefit to the business that offsets their additional expense, knowing that switching to Green would boost the company's brand and image among key constituents, and if the additional expense could be considered a tax write-off. The least-influential factors were bonuses or some other financial rewards given to people for making the switch, a major competitor touting its Green exhibiting progress, and if switching to Green would make employees feel good about their employer.

**FIGURE 11:**  
**Exhibitors indicate various factors could influence their decision to adopt Green exhibiting options.\***



\*MEAN RATING ON SCALE OF 1=NOT AT ALL A FACTOR TO 5=MAJOR FACTOR

Interestingly, exhibitors appear to be ambivalent about a Green certification's ability to influence them to switch to a Green option. Having a solution's Greenness certified in some objective way finished in the middle of the list of factors. Suppliers expressed somewhat stronger support for certification, with 55 percent of supplier executives indicating they were in favor of an industry-wide certification standard for Green exhibiting options.

The most-influential factor for getting exhibitors to switch to Green is if the Green solutions offered an upgrade in usability over traditional solutions in some important way.

**55%** of supplier executives are in favor of an industry-wide certification standard for Green exhibiting options.

## B. Conclusion

The data indicates that adoption of Green exhibiting options among exhibitors has been measured to date, but judging from exhibitors' budget plans, spending on Green options looks to be poised for a considerable increase. Indeed, exhibitors appear to maintain a high — and growing — level of interest in Green exhibiting options and are open to switching to such options under the right conditions. A near-majority of exhibitors also indicated that when they find suppliers that offer Green alternatives that meet their needs, they give or would consider giving such suppliers preferential treatment — typically in the form of additional consideration in a request for proposal and favored-supplier status. All of this adds up to a genuine business opportunity for suppliers, which we estimate to be \$9.24 billion.

The challenge for suppliers, of course, is how to tap into this new and dynamic market. Given the responses from exhibitors, we see three main areas that suppliers must address if they want to be seriously considered by Green-leaning exhibitors:

- ▶ **Price:** Most exhibitors demonstrated a willingness to pay more for a Green option that performs as well as a traditional one — but not 20 percent to 25 percent more, which is the average price premium charged by suppliers. Reducing this cost disparity will go a long way toward spurring broader adoption of Green exhibiting options.
- ▶ **Sourcing:** Exhibitors clearly were not pleased with the variety of Green options available to them, or the size of the pool of suppliers offering Green alternatives. Being more aggressive in finding new and more plentiful sources of Green raw materials will enable suppliers to provide a Green product line that is more attractive to their clients.
- ▶ **Awareness:** Along with sourcing, suppliers need to be more aggressive in marketing the Green options they provide. The fact that nearly half of exhibitors surveyed said they didn't know if their suppliers offered Green exhibiting options indicates suppliers aren't communicating effectively with their clients — a situation that, if corrected, could expand the market for suppliers' Green offerings.

Perhaps one of the best ways for suppliers to capitalize on growth opportunities in Green exhibiting is to focus on those exhibitors who described themselves as Green champions. Indeed, Green champions not only support Green options in theory, but they are putting action behind their talk. They are much more likely than non-champions to have deliberately purchased a Green exhibiting option of some kind, to be increasing the proportion of their budget earmarked for Green options in the coming year, to report their company has made a substantial commitment to Green exhibiting or adopted some Green elements, and to say that they give preferential treatment to companies offering Green options. Champions also are somewhat less price sensitive than non-champions when it comes to Green options (although most still seem to be unwilling to pay more than a 10-percent premium for Green offerings). If "leading lights" in the Green exhibit movement eventually emerge, it seems likely many would come from this group of individuals.

Although the survey results reveal a growing and untapped market for Green exhibiting options, it's difficult to say if or when Green will become the standard in exhibit products and services. But there is evidence to suggest that suppliers failing to provide desirable and relevant Green options will at some point suffer the consequences in terms of eroding sales and market share and, perhaps, a stigma of being environmentally irresponsible. Indeed, if a majority of a suppliers' clients believe environmentally-friendly practices are "the right thing to do" and that supplier fails to offer Green options, there's a good chance those clients eventually will take their business to a company whose philosophy mirrors their own.

**A near-majority of exhibitors said they give or would consider giving preferential treatment to suppliers that offer Green alternatives that meet their needs.**

**Suppliers must address three main challenges — price, sourcing, and awareness — if they want to be seriously considered by Green-leaning exhibitors.**

**There is evidence to suggest that suppliers failing to provide desirable and relevant Green options will at some point suffer the consequences in terms of eroding sales and market share.**



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# II. Full Research Report

The following full research report provides a detailed breakdown of specific findings within each of the two groups (exhibitors and suppliers) we polled, highlighting interesting differences in responses by the respondents' gender, age, title, company size (by revenue), and industry segment.

# A. Detailed Findings from Exhibitors

## Exhibitors' Interest in Green Exhibiting Options

Interest in Green exhibiting options is high among most exhibitors in our survey (**Figure 12**). A majority of exhibitor respondents (62 percent) reported being personally interested or very interested (a rating of 4 or 5 on a scale of 1=no interest to 5=very high interest) in

Green exhibiting options. For exhibitors, the mean rating was 3.7. Women were slightly more likely than men to indicate being interested or very interested (63 percent vs. 58 percent), as were respondents at the younger end of the age spectrum. Those in general marketing roles (i.e., non-executive marketing positions) were the most likely of all positions (76 percent) to indicate high interest in Green exhibiting options, while respondents in general management positions (54 percent) were the least likely. Exhibit/event managers' interest tracked closely to that of the overall sample.

From a company perspective, organizations with annual revenues of between \$501 million and \$1 billion were the most likely to have respondents indicating substantial interest in Green exhibiting options (79

**FIGURE 12: Current interest in Green exhibiting options is high among exhibitors.\***

	1	2	3	4	5	Mean
<b>All exhibitors</b>	6% 	9% 	24% 	33% 	29% 	<b>3.70</b>
Professional services	3% 	8% 	8% 	42% 	37% 	4.02
Construction	4% 	12% 	16% 	48% 	20% 	3.68
Industrial/manufacturing	4% 	10% 	42% 	18% 	26% 	3.52
Electronics/high-tech	0%	7% 	24% 	41% 	28% 	3.90
Consumer products/hospitality	5% 	8% 	22% 	28% 	34% 	3.72
Government	22% 	6% 	22% 	39% 	11% 	3.11
Medical/healthcare	7% 	10% 	30% 	28% 	25% 	3.55
Financial services/real estate	0%	8% 	25% 	33% 	33% 	3.92

\*MEAN RATINGS ON A SCALE OF 1=NO INTEREST TO 5=VERY HIGH INTEREST

percent) — followed by the smallest organizations in the survey (those with less than \$1 million in revenue) with 76 percent — while companies in the \$51 million to \$100 million revenue range were the least likely (55 percent). Personal interest seems to be highest among respondents in the professional services (54 percent) and consumer products/hospitality (53 percent) sectors, and lowest among those in government (17 percent) and electronics/high-tech (21 percent).

Just over half of all respondents said their interest in Green exhibiting options increased somewhat (39 percent) or significantly (18 percent) in the past year. Forty-two percent indicated their interest level was unchanged. Women were more likely than men to have increased interest, while from an industry standpoint, an increase in interest was most prevalent in the following sectors: construction (68 percent), electronics/high-tech (62 percent), government (61 percent), and consumer products/hospitality (60 percent).

This upward trend is likely to continue, as 62 percent of all respondents believe their interest in Green options will increase somewhat (48 percent) or significantly (14 percent) in the next six to 12 months. Women will be leading the way, with just under 70 percent indicating their interest will increase during that time. Respondents in senior-executive (49 percent) and general-management (46 percent) positions were the least likely to say their interest would increase, while individuals in marketing/sales management (66 percent) and general marketing roles (71 percent) were most likely to anticipate increased interest. Exhibit/event managers, again, were in line with the trend among the overall sample.

The most prevalent increase in interest likely will be among larger companies in our sample, those with the biggest trade show budgets, and organizations in the government, services, and construction sectors.

## Drivers of Increased Interest in Green Exhibiting Options

What is driving exhibitors' interest in Green exhibiting options? It's not that other companies are focusing more on the issue. Just 16 percent of exhibitors said an increase in attention to environmental issues from competitive companies has influenced their interest in Green exhibiting options. Rather, the drive for Green appears to be an outgrowth of respondents' increased interest in environmental and social causes in general

— 66 percent cited this as a factor — as well as an ethical judgment: 66 percent of respondents said they consider environmentally-friendly practices “the right thing to do.”

But altruism is not all that's driving their focus. Indeed, a majority (51 percent) of respondents also said they are focusing more on Green because they think Greener practices will enhance the company's brand and image in the marketplace. This view is much more prevalent among individuals in general management (69 percent) than in any other functional group we surveyed. In fact, exhibit/event managers were among the least likely to say their interest in Green exhibiting options was driven by a desire to boost the company's image.

Among the factors we studied, the following were the least influential factors driving exhibitors' interest in Green exhibiting options: more Green alternatives from exhibiting product or service suppliers are now available (29 percent), company management has asked employees to adopt Greener business practices (20 percent), and respondents perceive increased pressure from investors, customers, and other stakeholders to be more environmentally conscious (17 percent).

These factors differ somewhat among industry sectors. For example, Greener practices' potential to boost a company's brand and image was the most popular factor among respondents in the professional services (71 percent) and construction (67 percent) sectors. This factor also received a strong vote of support from those in the consumer products/hospitality industry (64 percent), where the top factor was not a general increase in respondents' personal interest in environmental and social issues, but the notion that going Green was the right thing to do. A near majority of professional services (48 percent) and construction (47 percent) respondents, as well, indicated that a rise in availability of Green exhibiting options has boosted their interest in such options.

## Exhibitors' Adoption of Green Exhibiting Options

In addition to the high level of current and projected interest among exhibitors, about one-third of respondents actually consider themselves a champion of Green exhibiting options in their company, advocating for increased adoption of Green options. Men are more likely than women to say they are champions, as are respondents in the 45-plus age bracket. Respondents

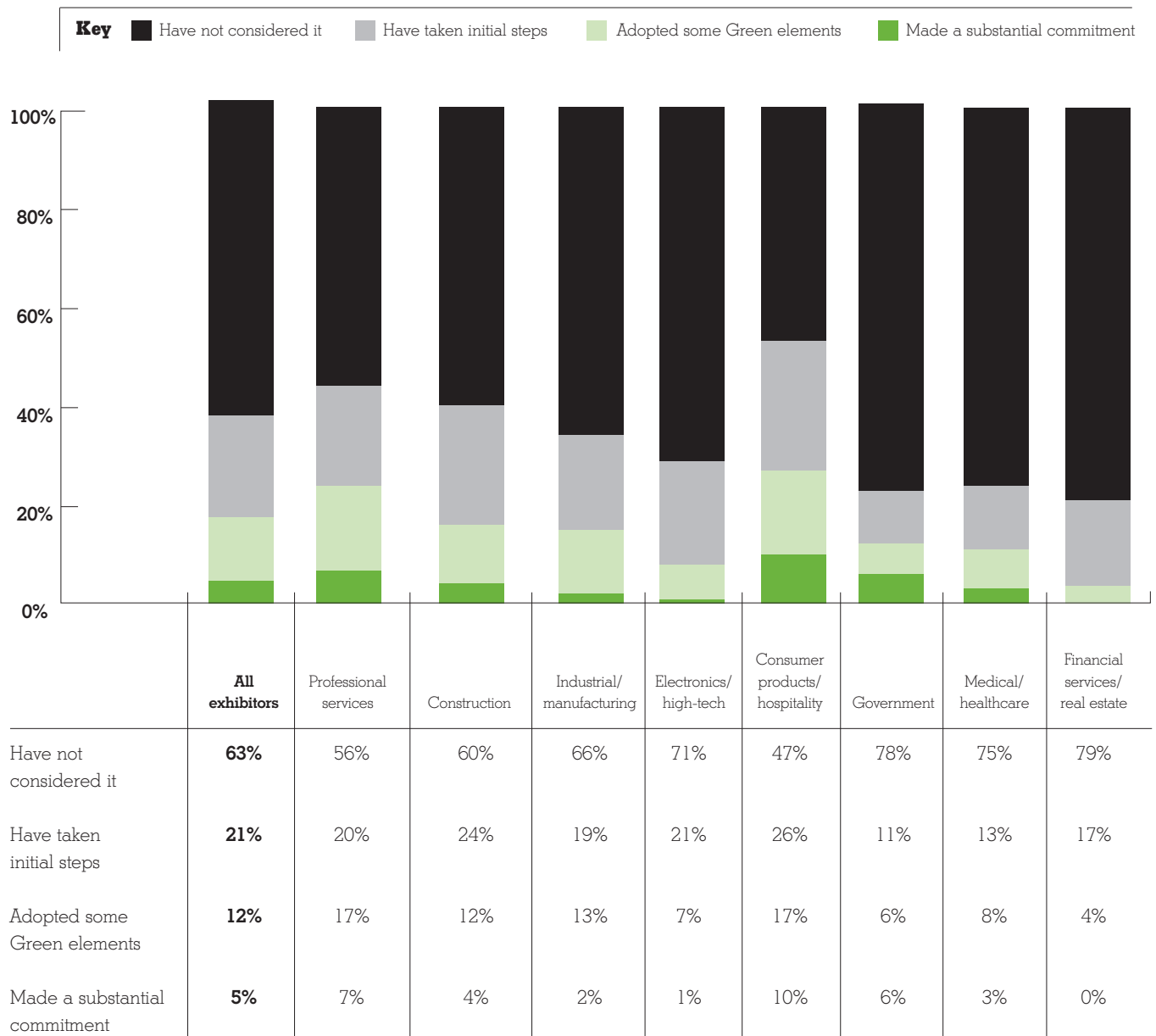
in general management (61 percent) are far more likely than any other position surveyed to claim to be a champion, outpacing exhibit/event managers by more than 30 points. It is more likely to find Green champions in smaller companies with smaller trade show budgets, as well as in the consumer products/hospitality sector (51 percent).

About one-fourth of exhibitor respondents said they deliberately purchased a Green exhibiting product or service. Men were slightly more likely than women, and older respondents slightly more likely than younger ones, to have reported a deliberate purchase of a Green exhibiting option. Interestingly, the senior executives in our survey appear to be setting an example for others in their organizations. Forty percent of owners, presidents, and partners said they purchased a Green exhibiting option intentionally, compared with just 19 percent of exhibit/event managers and 18 percent of marketing/sales executives.

While a majority of companies have not yet considered adopting Green exhibiting options (63 percent), 21 percent have taken some small initial steps toward adopting them, 12 percent have adopted some Green elements, and 5 percent indicated they've made a substantial commitment to Green exhibiting (**Figure 13**). The smallest companies in our survey — those

owners, presidents, and partners said they purchased a Green exhibiting option intentionally, compared with just 19 percent of exhibit/event managers and 18 percent of marketing/sales executives.

**FIGURE 13: Exhibitors have made progress toward adopting Green exhibiting options.**



with less than \$1 million in revenue — are the most likely to have made some progress, with 29 percent having taken some initial steps, 18 percent having adopted some Green elements, and 12 percent having made substantial progress. Midsize companies — those with between \$10 million and \$100 million in revenue — are the furthest behind, while the largest companies are somewhere in the middle.

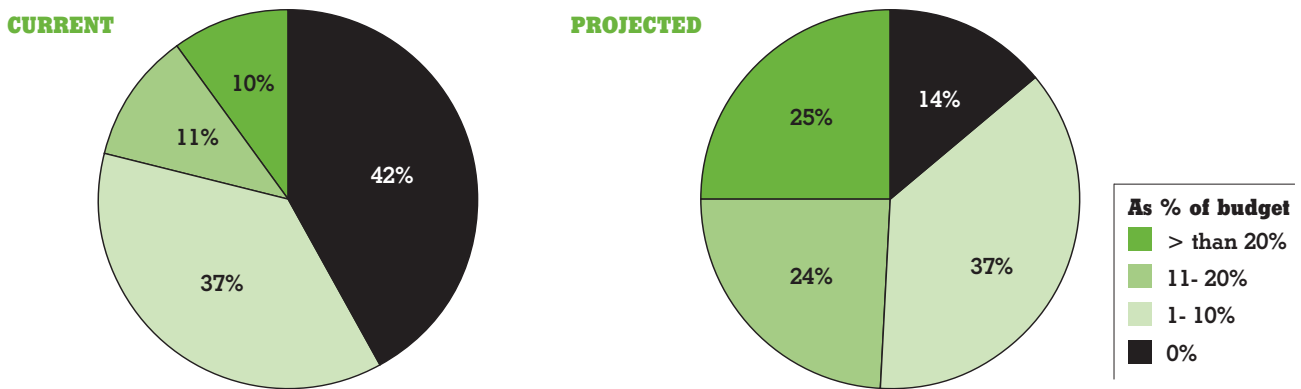
From an industry perspective, consumer products/hospitality companies seem the furthest along, with less than half (47 percent) of respondents saying they have not considered the issue and 27 percent indicating they have either adopted some Green elements or have made substantial progress. The laggards are companies in the financial services/real estate, government, medical/healthcare, and electronics/high-tech sectors, where between 71 percent and 79 percent of respondents said their companies have failed to consider Green exhibiting options to date.

Exhibitors are currently spending money on Green options, but at a measured pace. While 42 percent of respondents said they haven't spent anything on Green

exhibiting options, 37 percent allocate between 1 percent and 10 percent of their total exhibit/trade show budgets to Green products or services. Company size does not appear to be a factor, although companies in a few industries — namely, professional services, industrial/manufacturing, consumer products/hospitality, and medical/healthcare — are somewhat more likely to earmark at least some of their budgets to Green exhibiting options. But even in these cases, few companies noted dedicating more than 20 percent of their budget to Green options.

In the future, however, the scenario is expected to change (**Figure 14**). Only 14 percent of respondents said they expect to spend nothing on Green exhibiting options one year from now. Our findings indicate that the percentage of companies' exhibit/trade show budgets allocated to Green options will increase in the coming year. While the percentage of respondents saying they will dedicate between 1 percent and 10 percent of their budget remains the same (37 percent), the percentage of those committing between 11 percent and 20 percent jumps 13 points (from 11 percent to 24

**FIGURE 14: The percentage of exhibitors' budgets dedicated to Green exhibiting options is expected to increase in the coming year.**



**Exhibitors' expectations of what percentage of their 2008 budgets will be dedicated to Green options.**

2008:	0%	1-10%	11-20%	21-30%	31-40%	41-50%	50-75%	75%+
<b>All exhibitors</b>	14%	37%	24%	13%	4%	3%	5%	0%
Professional services	14%	29%	27%	12%	3%	5%	10%	0%
Construction	20%	24%	36%	12%	4%	4%	0%	0%
Industrial/manufacturing	14%	35%	24%	15%	4%	2%	3%	1%
Electronics/high-tech	10%	40%	22%	16%	4%	7%	0%	0%
Consumer products/hospitality	14%	33%	22%	12%	5%	3%	10%	1%
Government	39%	22%	28%	6%	0%	0%	6%	0%
Medical/healthcare	13%	50%	22%	10%	0%	0%	5%	0%
Financial services/real estate	4%	54%	38%	0%	0%	4%	0%	0%

percent), and the percentage of companies earmarking between 21 percent and 30 percent rises nine points (from 4 percent to 13 percent).

The smallest companies in our survey (those with less than \$1 million in revenue) appear to lead the way in budgeting for Green exhibiting options. In fact, 20 percent of respondents representing such organizations said they plan to devote between half and three-fourths of their budgets to Green options a year from now. Professional services and consumer products/hospitality companies — and, to a lesser extent, industrial/manufacturing organizations — seem to be making the biggest push toward Green exhibiting from a budgeting perspective, while government entities appear to be moving the slowest.

But is it realistic to think that a company could ever dedicate a significant portion of its exhibit budget to Green options? Across all respondents, the mean percentage of the exhibit budget that exhibitors could theoretically convert to Green options is 24 percent.

According to rough extrapolations of our survey data, using figures from EXHIBITOR magazine's 2007 Salary Survey, Tradeshow Week, and the Center for Exhibition Industry Research, the annual industry-wide market potential for Green exhibiting options is \$9.24 billion.

Men and women see pretty much eye to eye on this issue, while senior executives and general management are more likely than other roles to think they could allocate a slightly larger portion of the budget — 31 percent and 33 percent, respectively — to Green exhibiting options. For their part, exhibit/event managers believe just 22 percent, on average, is convertible to Green options.

When viewed by size of company, the results are not especially different — with a few exceptions. Companies with revenues between \$501 million and \$1 billion believe 35 percent of their budget could go Green, compared with the 19 percent cited by companies with between \$251 million and \$500 million in revenue. From an industry perspective, the theoretical proportion ranges from a low of 16 percent and 18 percent, respectively, for medical/healthcare and construction companies, to a high of 30 percent and 32 percent, respectively, for consumer products/hospitality and professional services organizations.

Regardless of the projected figure, a large majority (75 percent) of respondents — and especially those in senior executive and general management roles — believe they ultimately will reach the target of converting

24 percent of their budgets to Green options. Interestingly, the youngest of our survey participants tend to be the most pessimistic — with 39 percent of these respondents believing they won't hit the theoretical percentage — while the oldest of our participants are the most confident: 86 percent of these individuals believe they will succeed. Confidence is highest among respondents in the construction and industrial/manufacturing sectors (88 percent and 80 percent, respectively, believe they will hit their target) and lowest among those in medical/healthcare companies (65 percent).

Among those companies that actually have used a Green exhibiting option, the experience has not been extensive. A majority of respondents representing these organizations said they have used a Green exhibiting option for a year or less — which is the case regardless of company size. As shown in **Figure 15**, the two categories of products or services in which most companies have adopted Green options are booth accessories (which includes bags, literature holders, and furnishings) and pre- and post-show marketing (which includes promotional items, brochures, and giveaways). Booth properties are third on the list, cited by 39 percent of respondents, followed by graphics/signage (33 percent), transportation (30 percent), lighting (27 percent), and carpeting/flooring (21 percent). Pre- and post-show marketing, transportation, and lighting seem to be a more popular area for Green options among companies with revenues of between \$51 million and \$100 million, while companies with more than \$1 billion in revenue concentrate their Green spending on booth accessories.

Overall, Green exhibiting has taken root in an "official" way at just under half of the companies surveyed, with 46 percent of respondents indicating their company has instituted a formalized Green initiative in some area of the organization. Such initiatives are more likely to be found in larger companies — especially those with revenues of more than \$500 million — and, not surprisingly, companies with larger trade show budgets. Across the industry spectrum, organizations in the construction (60 percent), professional services (56 percent), and consumer products/hospitality (55 percent) sectors are most likely to have formal Green initiatives, while medical/healthcare (38 percent) and industrial/manufacturing (41 percent) companies are the least likely.

In most organizations, such Green initiatives impact the exhibit/event function or the marketing and sales

**FIGURE 15: Exhibitors have adopted a variety of Green exhibiting options.**



\*SAMPLE SIZE TOO SMALL TO REPORT ON

organization at large. Sixty-three percent of exhibit/event managers, and 75 percent of sales/marketing executives, said their company’s Green efforts do, indeed, apply to their function as well.

## Obstacles to Broader Adoption of Green Exhibiting Options

Impediments to greater adoption of Green exhibiting options abound (Figure 16). We asked participants to rate, on a scale of 1=not at all an obstacle to 7=a very significant obstacle, eight different potential obstacles in terms of the extent each prevents them from embracing Green exhibiting options more broadly. We

found that, based on mean ratings, the most significant obstacle is price, with a mean rating of 5.33. Indeed, 54 percent of respondents said the generally higher prices of Green exhibiting options compared with traditional options represent an obstacle or very significant obstacle to broader adoption. The sentiment was consistently prevalent across all major job functions we studied except for senior executives, among whom 44 percent rated price a 6 or 7. Price was also the No. 1 obstacle across all the industry groups (although in some the mean rating was higher than in others, indicating that cost is especially problematic).

On the other hand, there was not a consistent view of the significance of cost as an obstacle across com-

**FIGURE 16: Price tops exhibitors' list of obstacles to greater adoption of Green exhibiting options.\***



\*MEAN RATINGS ON A SCALE OF 1=NOT AT ALL AN OBSTACLE AT ALL TO 7=VERY SIGNIFICANT OBSTACLE

pany sizes. While one might expect cost to play a bigger role in the decisions of smaller companies, it actually was more prominent among respondents at companies with revenues between \$501 million and \$1 billion, who gave the factor a mean rating of 6.00. At the other end of the spectrum were participants from companies with \$251 million to \$500

million in revenue, who delivered an average rating of 4.79.

The second-largest obstacle among all exhibitor respondents was a lack of variety in Green exhibiting options currently available, which received a mean rating of 4.61. Thirty-two percent of exhibitors deemed the lack of variety as an obstacle or very significant



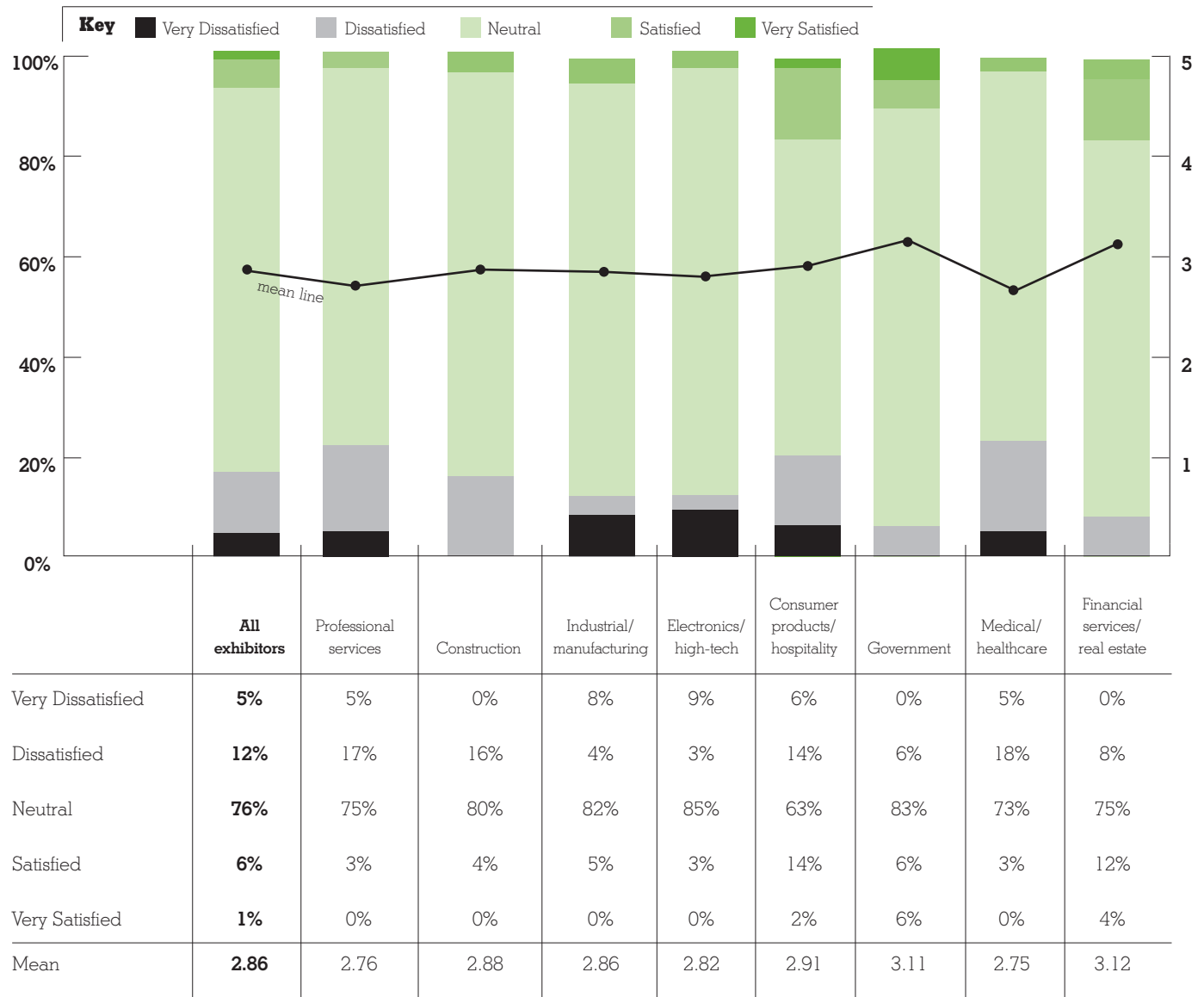
obstacle. Close behind lack of variety was a somewhat related issue, too small of a supplier pool providing Green exhibiting options, which received a mean rating of 4.56 and was rated an obstacle or very significant obstacle by 30 percent of respondents. The remainder of the top five obstacles included a lack of metrics to quantify the business impact of Green exhibiting (4.49) and a lack of consensus on what constitutes “Green” in the exhibit world (4.34). Exhibitors viewed concern over whether Green options would perform as well as traditional materials and management’s general disinterest in Green options as the least-significant obstacles to broader adoption of Green exhibiting options.

When looking at the data more closely, we found that different obstacles assumed more or less prominence depending on the industry in question. As noted, cost

was the biggest obstacle across all industries, by a large margin. But from there, industry sectors diverged. For instance, lack of variety in Green options currently available was the second-largest obstacle in the professional services, industrial/manufacturing, consumer products/hospitality, and medical/healthcare sectors, but was third in electronics/high-tech, fourth in construction and financial services/real estate, and sixth in government. Similarly, the fourth-largest obstacle overall — lack of metrics — finished second in financial services/real estate and electronics/high-tech, third in government, fourth in industrial/manufacturing and consumer products/hospitality, fifth in professional services, and sixth in construction and medical/healthcare.

In much the same way, the importance of obstacles

**FIGURE 17: Many exhibitors are dissatisfied with suppliers’ Green offerings.**



varied substantially by company size. Cost, of course, was the top obstacle across all company sizes. But lack of variety in Green exhibiting options — which was either second or third for most company sizes — finished sixth among respondents representing companies with revenues between \$51 million and \$100 million. Lack of metrics finished anywhere from second to sixth, landing at second among larger companies and fifth or sixth among smaller ones. Similarly, lack of consensus was a much larger obstacle for midsize companies, but less of an issue for the smaller and larger organizations. On the other hand, substandard performance of Green exhibiting options and management's disinterest consistently ended up seventh or eighth among all but one category of companies.

To probe more deeply on the cost issue in our survey, we asked exhibitors what they expected to pay for Green exhibiting options today: more or less than traditional options — and by how much — or the same as traditional options. Sixty-three percent of respondents indicated they expected to pay more, one-third said they expected Green options to cost the same as traditional options, and 4 percent believed Green options should cost less than traditional options.

Among those expecting to pay more, the mean premium over traditional options they anticipated having to pay was just under 23 percent.

## Exhibitors' Perceptions of and Satisfaction with Suppliers' Green Offerings

A majority of respondents (69 percent) believe there are too few suppliers of Green exhibiting options. This view is more prevalent among women (74 percent) than men (60 percent). Twenty-eight percent of respondents said there is the right number of providers for them, and a small percentage (3 percent) indicated that there are too many.

Furthermore, while 45 percent of respondents said at least some of their exhibiting products or services suppliers offer Green exhibiting options, the same percentage said they don't know if their suppliers provide such offerings, suggesting that suppliers could do a better job of communicating their Green product or service offerings to their customers (especially exhibit/event managers, 49 percent of whom are unaware if their suppliers offer Green exhibiting options).

Lack of awareness of Green offerings appears to be concentrated in the medical/healthcare, electronics/high-tech, and government sectors, where 52 percent, 56 percent, and 67 percent, respectively, said they didn't know if their suppliers provided Green exhibiting options.

In addition to wanting more suppliers offering Green alternatives, most respondents (65 percent) would like to see more variety in those offerings. About one-third of participants said they were generally happy with the selection their suppliers currently offer.

When asked to describe, as a group, the suppliers they deal with regularly, most exhibitors (61 percent) felt their suppliers seem to be sincere in their interest in Green exhibiting options but haven't made much tangible progress to date. An additional one-fourth said their suppliers have made some progress and are on the right track. One percent of exhibitors reported that their suppliers have made substantial progress and are leaders in the area, while 15 percent said their suppliers talk a good game but really don't deliver when it comes to Green alternatives.

Overall, exhibitors' opinions of their suppliers' Green offerings are largely neutral to slightly dissatisfied (**Figure 17**). On a scale of 1=very dissatisfied to 5=very satisfied, exhibitors delivered a mean rating of 2.86. Seven percent indicated they were either satisfied or very satisfied, while 76 percent expressed neutral feelings. The ratings were very consistent across gender, age groups, company size, and titles (although those in general marketing positions were somewhat more dissatisfied). Respondents from government entities and financial services/real estate companies were slightly more satisfied than other industry sectors, delivering a mean rating of 3.11 and 3.12, respectively. But even those ratings still indicate that suppliers have much work ahead of them in meeting customers' needs for Green exhibiting options. (For a more detailed discussion of how satisfied exhibitors compare with dissatisfied ones, see *Satisfied vs. Dissatisfied Exhibitors* on page 29.)

The reward for meeting those needs could be a leg up on the competition. Indeed, 45 percent of exhibitors said when they find suppliers that offer Green alternatives that meet their needs, they give, or consider giving, those companies preferential treatment. This is particularly true of the smallest companies in our survey and services and construction organizations, but least true of the larger organiza-

tions we polled and those in the government and industrial/manufacturing sectors.

For the most part, this preferential treatment takes the form of additional consideration in a request for proposal (cited by 62 percent of exhibitors). In just under half of the companies involved in our survey, such treatment would or could include “favored supplier” status, and in 31 percent it might involve the automatic short listing of a supplier for relevant projects. The largest companies in our survey are fans of the “favored supplier” approach, while companies in the \$251 million to \$500 million range are most likely to provide additional consideration in an RFP.

## Factors That Would Influence Exhibitors to Switch to Green Options

One question we wanted answered was whether exhibitors would actually switch to Green exhibiting options and, if so, under what conditions? We found that an overwhelming majority of exhibitors — 89 percent — would switch to Green options as long as the Green options performed at least as well as traditional options and cost the same as traditional options. Once a price differential is a part of the equation, that percentage begins to decrease. For example, if the Green options cost 5 percent more, 73 percent indicated they would switch. Raise the price premium to 10 percent, and 45 percent would switch. If the price premium reached 15 percent, only 14 percent would make the move to Green options. And at a 20-percent premium, which we noted earlier is about what exhibitors said they expected to pay for Green options, only 6 percent affirmed they would still make the switch. (All of the preceding assumes equal performance between Green options and traditional options.) Price sensitivity seems relatively consistent across gender, age groups, titles, company size, and even industry sectors.

So cost, clearly, is an issue. But are there other factors that might persuade a company to switch to Green options — even if they must pay a 10-percent premium? We presented exhibitors with a list of nine factors and asked them to rate each on how significant a role it would play in convincing them to move to a Green option that cost 10 percent more than comparable traditional options (on a scale of 1=not at all a factor to 5=major factor).

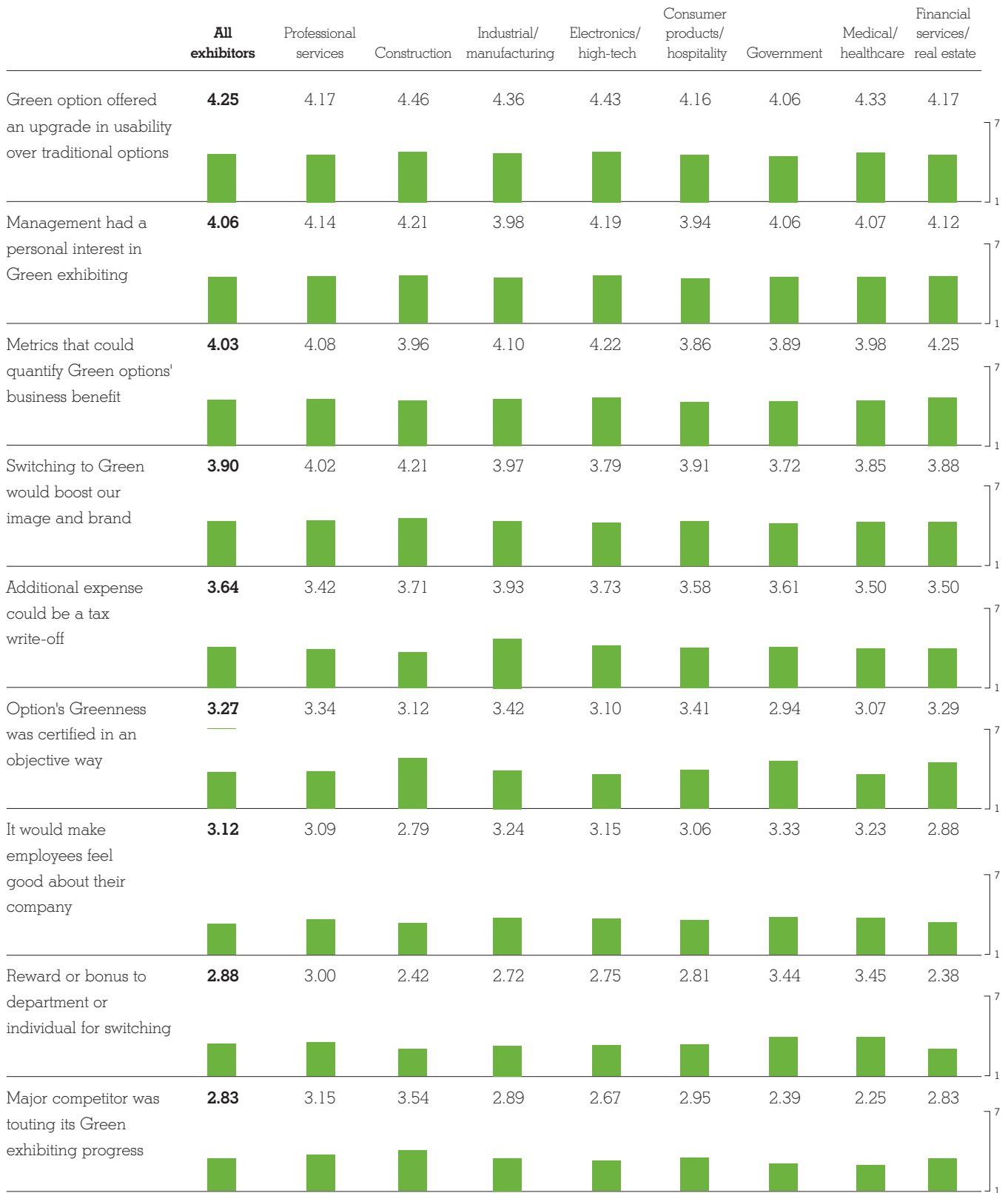
The most popular factor (**Figure 18**) was if the Green options offered an upgrade in usability over traditional options in some important way, such as a longer life or more flexible design. (**Figure 18**) This factor received a mean rating of 4.25. The next-largest factor that would convince exhibitors to switch to a Green option is if management had a personal interest in Green exhibiting (4.06), followed by having metrics that could demonstrate that Green options generate a quantifiable benefit to the business that offsets their additional expense (4.03), knowing that switching to Green options would boost the company’s brand and image among key constituents (3.90), and that the additional expense could be considered a tax write-off (3.64).

Although there has been talk in the industry about the possible need for a Green certification to make it easier for buyers to be sure their purchases meets some Green standard, participants in our survey didn’t seem to consider certification as a major factor in convincing them to switch to Green options. Having an option’s Greenness certified in some objective way received a mean importance rating of 3.27. The least-influential factors were bonuses or some other financial reward given to people for making the switch (2.88) and having a major competitor touting its Green exhibiting progress (2.83).

In looking at these factors from a gender perspective, we found that women consistently rated every factor as more important than men did, as evidenced by the gap in the mean importance ratings between the two groups. Furthermore, there are several instances in which women are much more likely than men to rate a factor a 4 or 5 in importance — most notably, metrics for demonstrating the business benefit of Green options (80 percent of women vs. 68 percent of men) and whether the Green option offered an upgrade in usability (89 percent of women vs. 71 percent of men).

The same type of disparity exists across the various functional groups participating in the survey — especially when comparing the responses of exhibit/event managers and senior executives (e.g., owners, presidents, and partners). Exhibit managers are much more likely than senior executives to feel that all factors are important, and the gap between the two groups’ mean ratings for each factor is often substantial, particularly when it comes to metrics that demonstrate quantifiable business benefits of Green options (4.22 for exhibit managers vs. 3.17 for senior executives); if the Green

**FIGURE 18: An upgrade in usability could convince exhibitors to adopt Green options.\***



\*MEAN RATINGS ON A SCALE OF 1=NOT AT ALL A FACTOR, TO 5=MAJOR FACTOR

option offered an upgrade in usability (4.39 vs. 3.65); if management had a personal interest in Green exhibiting (4.24 vs. 2.98); and if the additional expense for Green options could be considered a tax write-off (3.84 vs. 3.14).

## How Exhibitors Define Green

As noted earlier, the lack of consensus on what exactly qualifies an option as Green is one of the bigger stumbling blocks to broader adoption of Green exhibiting options. Indeed, it's difficult to find consistent definitions across the industry, making exhibitors' buying decisions more complex. Therefore, as part of this study, we sought to get exhibitors' views on what Green meant to them. More specifically, we asked them to rate (on a scale of 1=not at all important to 7=extremely important) a number of factors in terms of their impact on a product's Greenness (**Figure 19**).

The biggest factor for determining a product's Greenness is that the product is designed in such a way that it's more efficient to ship — which garnered a mean rating of 5.90. This is followed by whether the product has any toxic or harmful components or ingredients (5.68) and whether the product is made from materials that are endangered or in short supply (5.63). Related to the top factor is the extent to which a product has a modular design that promotes reuse of the components, which exhibitors ranked fourth at 5.54. Fifth on the list is whether the product is designed to consume less material overall (5.45), followed by the extent to which the product is recyclable (5.30), and how much of the product is made from recycled materials (5.22).

The least-important factors in defining Greenness, according to exhibitors, are how much waste from its operations a manufacturer reclaims, how efficient and non-polluting a manufacturer's operations are, how well a manufacturer conserves energy and water, and whether a manufacturer uses hybrid or more fuel-efficient vehicles as part of its operations. It's important to note that these process-related factors are not unimportant to exhibitors. Rather, they are comparatively less important than factors involving the products themselves.

As was the case with several other issues in the survey, there was a substantial difference between how men and women viewed these Greenness factors. Again, women were much more likely than men to rate all of the Greenness factors as important, and they are especially keen on whether the product's design promotes efficient shipping, whether it's made from

endangered materials, and whether it contains toxic or harmful ingredients or components. These were all issues at the top of the men's list as well, but they didn't receive quite such high ratings.

## Satisfied vs. Dissatisfied Exhibitors

As noted elsewhere in this report, satisfaction among exhibitors with their suppliers' Green offerings is largely neutral. However, 7 percent of respondents said they were either satisfied or very satisfied, and 17 percent indicated they were either dissatisfied or very dissatisfied. In exploring the response to our survey questions given by these polar-opposite groups, we identified a number of interesting differences.

First, it's important to note that the age and title distribution in both groups is largely the same (with the dissatisfied exhibitors having a slightly-higher percentage of marketing or sales managers), and both groups contain the identical percentage — 44 percent — of people indicating they have the final decision on exhibiting-related product and service purchasing decisions. Satisfied exhibitors are evenly distributed between men and women, while dissatisfied exhibitors are primarily women (62 percent vs. 35 percent). While the satisfied group is concentrated in the consumer products/hospitality industry, the dissatisfied group spans all sectors. Both groups have wide representation of companies in terms of revenue.

When comparing the answers from these two groups, we first found that dissatisfied exhibitors were much more likely to say their personal interest level in Green exhibiting options is high or very high (87 percent vs. 65 percent). Yet both groups were about equally as likely to say they considered themselves a champion of Green options in their company.

Dissatisfied exhibitors were somewhat less likely to have deliberately purchased a Green product or service, although they are much more likely to say they plan to do so in the next 12 months. And, they are far more likely to believe there are too few suppliers of Green exhibiting options and that the variety of Green alternatives available to them is too limited — a sentiment echoed by the fact that dissatisfied exhibitors are also much more likely to say that none of their exhibiting product or service providers offer Green options.

One area where the two groups diverge is how they describe their current suppliers' Greenness. Thirty-five percent of dissatisfied exhibitors, vs. just 5 percent of satisfied ones, said their suppliers talk a good game but

**FIGURE 19: Several factors contribute to exhibitors' perceived "Greenness" of products and services.\***



\*MEAN RATINGS ON A SCALE OF 1=NOT AT ALL IMPORTANT TO 7=EXTREMELY IMPORTANT

really don't deliver. Conversely, 65 percent of satisfied exhibitors, vs. only 11 percent of dissatisfied ones, said their suppliers have made some progress and are on the right track. Fifty-four percent of the dissatisfied group (compared with 24 percent of satisfied exhibitors) said their suppliers seem to be sincere in their interest even though they haven't done much to date.

Satisfied exhibitors also appear to have more experience working with Green options. They are more likely to work for a company that has formalized Green initiatives in some area of the organization, has either adopted some Green exhibiting elements already or has made a substantial commitment to Green exhibiting options, and has been using Green exhibiting options for more than two years. On the other hand, both satisfied and dissatisfied exhibitors allocate about the same amount of their exhibiting budget to Green options and have similar budget plans for one year from now.

Perhaps one of the reasons that satisfied exhibitors are satisfied is that their expectations are not high enough. We reviewed each group's responses to questions about the importance of various Greenness factors to their decision to use a Green option, and found that satisfied exhibitors consistently rated the importance of each of the 11 factors we studied lower than dissatisfied exhibitors did. By placing less importance on each of these factors, are satisfied exhibitors setting the bar too low, thus making it easier for suppliers to claim victory?

Dissatisfied exhibitors are much more likely to give preferential treatment to suppliers that offer Green alternatives that meet their needs — mostly in the form of additional consideration for an RFP or favored-supplier status. However, dissatisfied exhibitors appear more likely to adopt Green exhibiting options if the

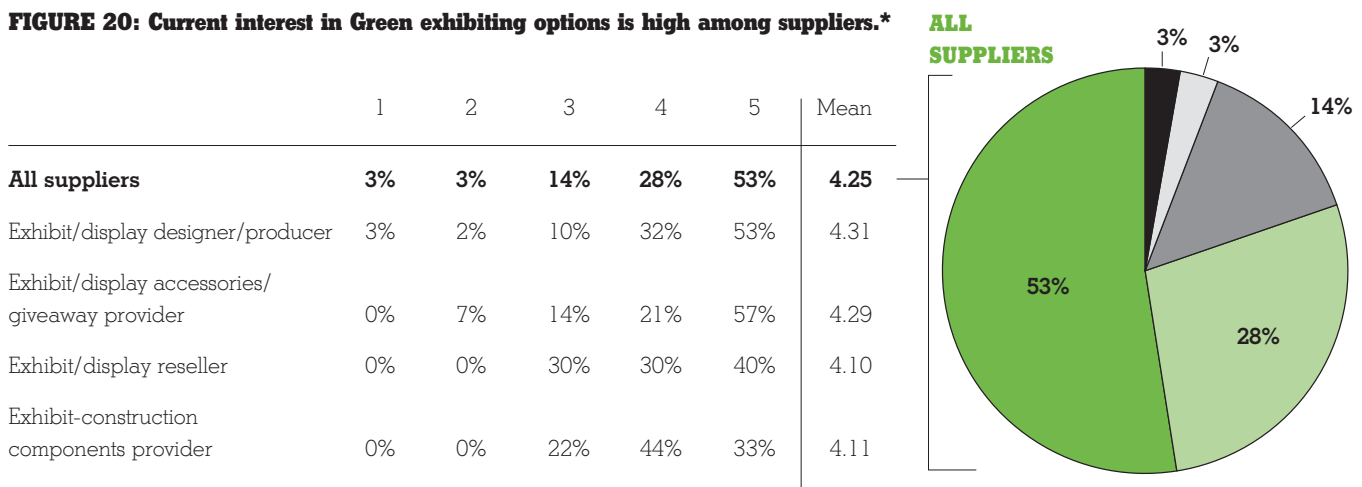
price is right. Eighty-five percent of dissatisfied exhibitors, vs. 71 percent of satisfied ones, said they would switch to Green options from traditional ones if the Green options cost 5 percent more. If the price for Green was 10 percent more, a majority — 60 percent — of dissatisfied exhibitors (compared with 46 percent of satisfied ones) still would make the move. However, if the price premium reaches 15 percent, just 17 percent of both groups said they'd switch. Virtually none of the respondents in either group would pay a 20- or 25-percent premium for Green exhibiting options.

## B. Detailed Findings from Suppliers

### Suppliers' Interest in Green Exhibiting Options

Like exhibitors, executives of exhibiting products and services suppliers also report having a high personal interest in providing Green options (**Figure 20**). On a scale of 1=very low to 5=very high, 81 percent gave a rating of 4 or 5, with 53 percent indicating their interest was very high. Overall for suppliers, the mean rating was 4.25. Ratings were relatively consistent across all types of suppliers, titles within those companies, and gender of respondents — although the largest suppliers in the survey, those with more than \$50 million in revenue, were least likely to have a high interest in Green

**FIGURE 20: Current interest in Green exhibiting options is high among suppliers.\***



\*ON A SCALE OF 1=VERY LOW TO 5=VERY HIGH

options (with a mean rating of 3.67). Furthermore, 71 percent of all supplier respondents said their personal interest in Green exhibiting options has increased somewhat or significantly, although individuals representing companies at the opposite ends of the revenue spectrum (less than \$1 million and more than \$50 million) were less likely to report an increase in interest.

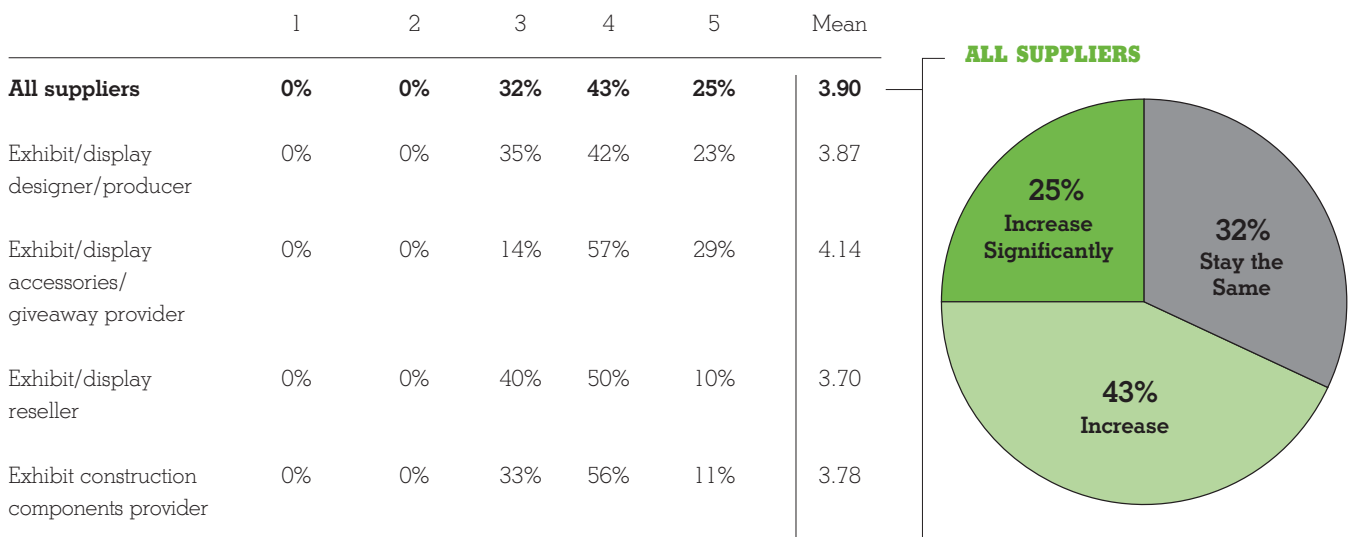
Why the increase? The top two reasons were that supplier executives believe employing environmentally-friendly practices is the right thing to do (69 percent) and that executives' overall personal interest in environmental issues and social causes has increased (67 percent). Half of supplier executives said they've been inspired to think about Green because they believe adopting Greener practices will enhance their company's brand and image (a sentiment most prominent among display resellers and individuals younger than 35), while just under half said they've become more interested in Green because there are now more available and commercially practical Green materials. Respondents overall are about equally split on whether the increased attention to environmental issues from competitive companies has influenced their views on Green options, with 32 percent saying it has and 39 percent indicating it hasn't. Respondents at companies supplying display accessories/giveaways are the most likely to report altering their views because of the competition's increased interest.

In the future, supplier executives expect their interest in Green exhibiting options will continue to rise (**Figure 21**). Sixty-eight percent said their interest will increase or increase significantly in the next six to 12 months, with women outpacing men in the strength of their response (81 percent vs. 62 percent).

It appears that the interest in Green exhibiting options throughout suppliers' companies is not as high as their own personal interest. When asked to indicate what they thought was their overall company's interest in Green exhibiting options, respondents gave a substantially lower mean rating of 3.85. Furthermore, suppliers are evenly split when it comes to institutionalizing a Green way of thinking: When asked if their company has any formalized Green initiatives, 48 percent said yes and 49 percent said no. Providers of accessories/giveaways (71 percent) and companies with more than \$50 million in revenue (83 percent) were much more likely than other types and sizes of companies in our survey to report having formal Green initiatives. Overall, 72 percent of respondents indicated these initiatives were company wide, although the largest companies in our survey were just as likely to have companywide initiatives as those targeted at specific product lines.

Unlike exhibitors, supplier representatives are much more willing to assume the mantle of Green proponent in their organizations. Just under 60 percent of all supplier executives consider themselves a champion of Green options in their company, with owners and other senior executives more likely than

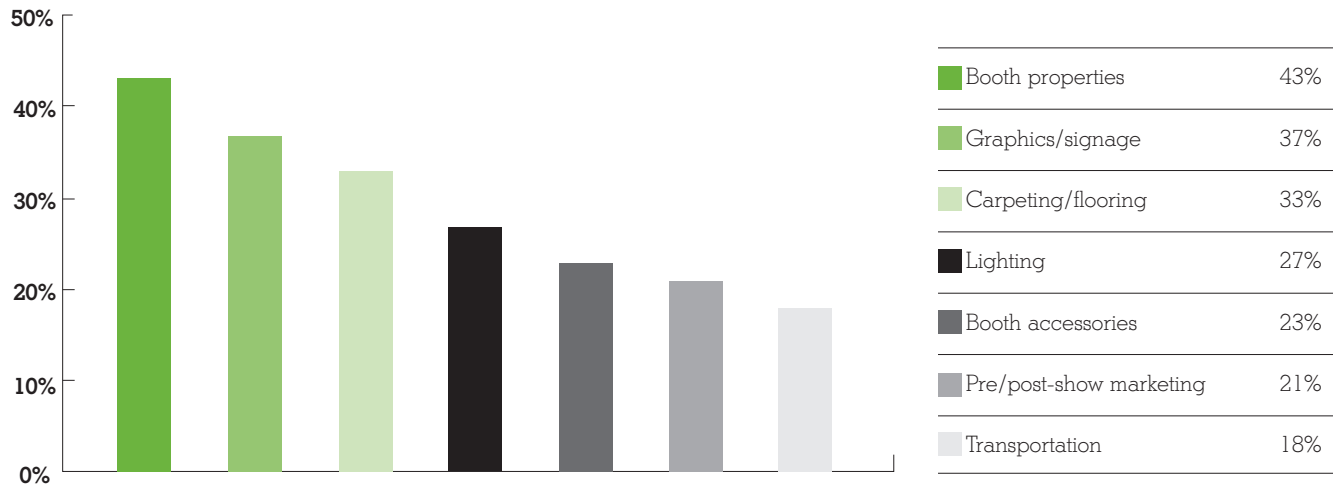
**FIGURE 21: Suppliers expect their interest in Green exhibiting options will increase in the next six to 12 months.\***



\*ON A SCALE OF 1=DECREASE SIGNIFICANTLY TO 5=INCREASE SIGNIFICANTLY



**FIGURE 22: Suppliers offer Green options in various categories.**



sales and marketing managers to say they are champions. The youngest among the supplier respondents were least likely to consider themselves champions.

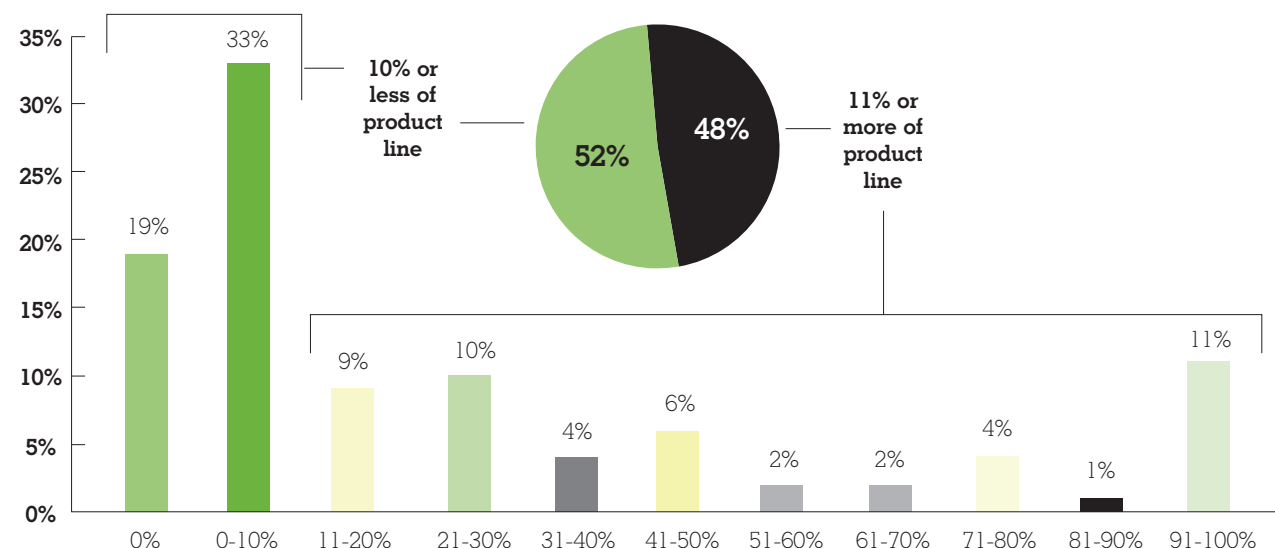
## Suppliers' Green Exhibiting Offerings and Their Impact on Revenue

From an offering perspective, Green options are most commonly found in booth properties (*Figure 22*) — cited by 43 percent of respondents — followed by graphics/signage (37 percent), carpet/flooring (33 percent), and lighting (27 percent). Approximately one in five respondents said they provide Green options as part of their booth accessories or pre- and post-show marketing products, while about the same percentage — 21

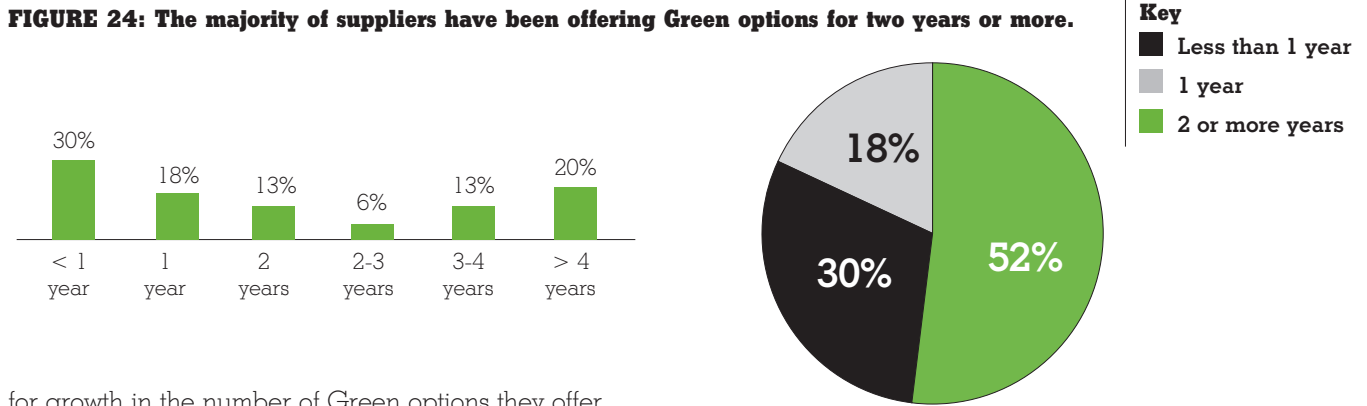
percent — said they do not offer a Green option. Exhibit/display designers/producers are most likely, by a wide margin, to indicate they offer Green options in booth properties, while exhibit/display accessories/giveaway providers are most likely to have Green lighting alternatives. Exhibit/display resellers are most likely to indicate they provide no Green options.

Across all suppliers in the survey, Green exhibiting options account for approximately 28 percent of the average supplier's total product line, with 52 percent of all suppliers saying 10 percent or less of their product line includes Green options (*Figure 23*). Not surprisingly, there's a big disparity in averages when one factors company size is into the equation. For instance, among the smallest suppliers in our survey, the average is 38 percent, while among the largest, it's just 13 percent. But all suppliers, even the largest, think there's room

**FIGURE 23: For most suppliers, Green options account for 10 percent or less of their total product line.**



**FIGURE 24: The majority of suppliers have been offering Green options for two years or more.**



for growth in the number of Green options they offer. According to their responses, Green options could theoretically account for nearly half (46 percent) of the average supplier's total product line. Furthermore, an overwhelming percentage of suppliers (78 percent) believe they will eventually reach that theoretical percentage and Green just under half of their product lines.

Many suppliers in our survey are not just recent converts to Green approaches (**Figure 24**). Indeed, fully one-third of companies said they have been providing Green exhibiting options for either three to four years (13 percent) or more than four years (20 percent). An additional 19 percent have been offering Green products or services for between two and three years, while 48 percent have been in the game for a year or less. But regardless of how long they've been at it, most suppliers have made some progress in providing Green exhibiting options overall (**Figure 25**) — whether it's some initial steps (43 percent), moderate progress (23 percent), or substantial progress (22 percent). Progress appears to be most prevalent among the medium-sized and smaller suppliers in our survey than in the larger ones. (For a more detailed discussion about how suppliers that have made substantial progress in offering Green options compared with those that haven't, see Leaders and Laggards on page 38.)

We also found that suppliers are gradually increasing the amount of revenue they generate from Green exhibiting options. Seventy-five percent of suppliers indicated that Green options accounted for less than 10 percent of their total revenue one year ago. Today, only 58 percent of suppliers report falling into that category (**Figure 26**). One-fourth of companies reported Green exhibiting options comprise between 11 percent and 30 percent of their total sales today, while 16 percent said more than 30 percent of their sales comes from Green options. The biggest suppliers in the survey are the least likely to

have seen Green options generate more than 10 percent of their overall sales. Reflecting these figures, 70 percent of all supplier executives said offering Green exhibiting options has not had a material effect on sales (while just 25 percent said they have increased sales somewhat).

In the next year, however, suppliers anticipate their Green exhibiting options will make a bigger contribution to the top line — although most of the movement will be at the lower end of the scale. While 32 percent said they still anticipate Green options will account for less than 10 percent of their total sales, 52 percent believe Green options will represent between 11 percent and 30 percent of their business. One-fourth indicated Green exhibiting options will account for more than 30 percent to their overall revenues.

## Obstacles to Higher Sales of Green Exhibiting Offerings

Perhaps the reason for the lack of Green options' current impact on sales can be traced further up the supply chain (**Figure 27**). According to 77 percent of supplier executives, there are too few suppliers of Green raw materials or Green products they source, and 75 percent of supplier executives would prefer a greater variety of Green options available from their suppliers. This latter sentiment is especially prevalent among respondents representing exhibit/display designers/producers, 81 percent of whom expressed a desire for greater variety.

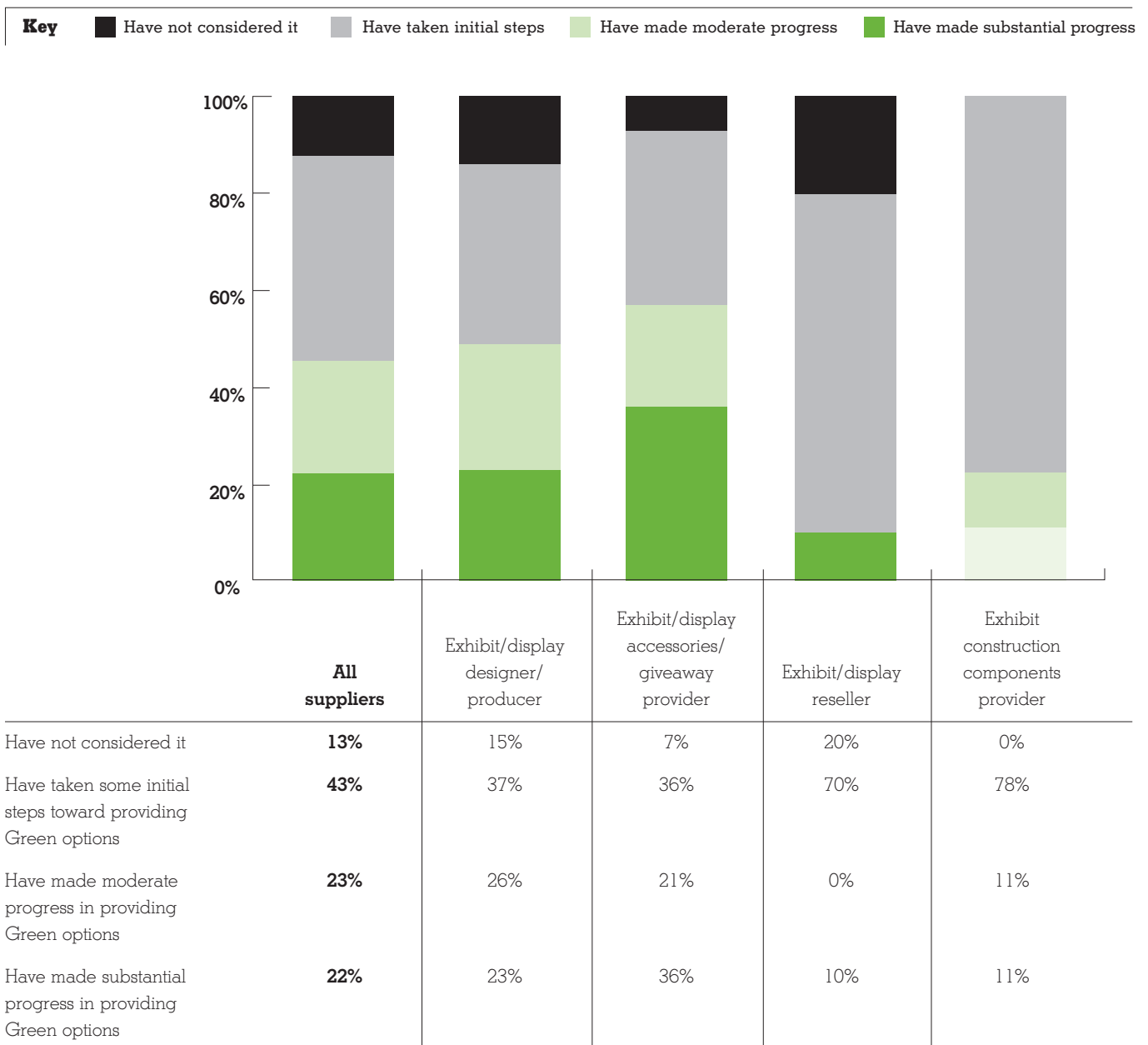
According to supplier executives, lack of variety and selection of Green materials and products is only one of a handful of major roadblocks to offering additional Green options (**Figure 28**). We asked survey participants to rate six potential obstacles in terms of how significant an obstacle they are to their company's ability

to offer more Green alternatives to clients — using a scale of 1=not at all an obstacle to 7=very significant obstacle. Four of the six obstacles finished essentially tied at the top of the list with a mean rating of around 5: higher overall cost of Green options, insufficient availability of Green options, lack of knowledge about available Green options, and lack of consensus on what constitutes a Green or sustainable option. The remaining two — increased lead time for sourcing Green options (4.3) and inferior performance of Green products (3.83) — finished well behind the leaders.

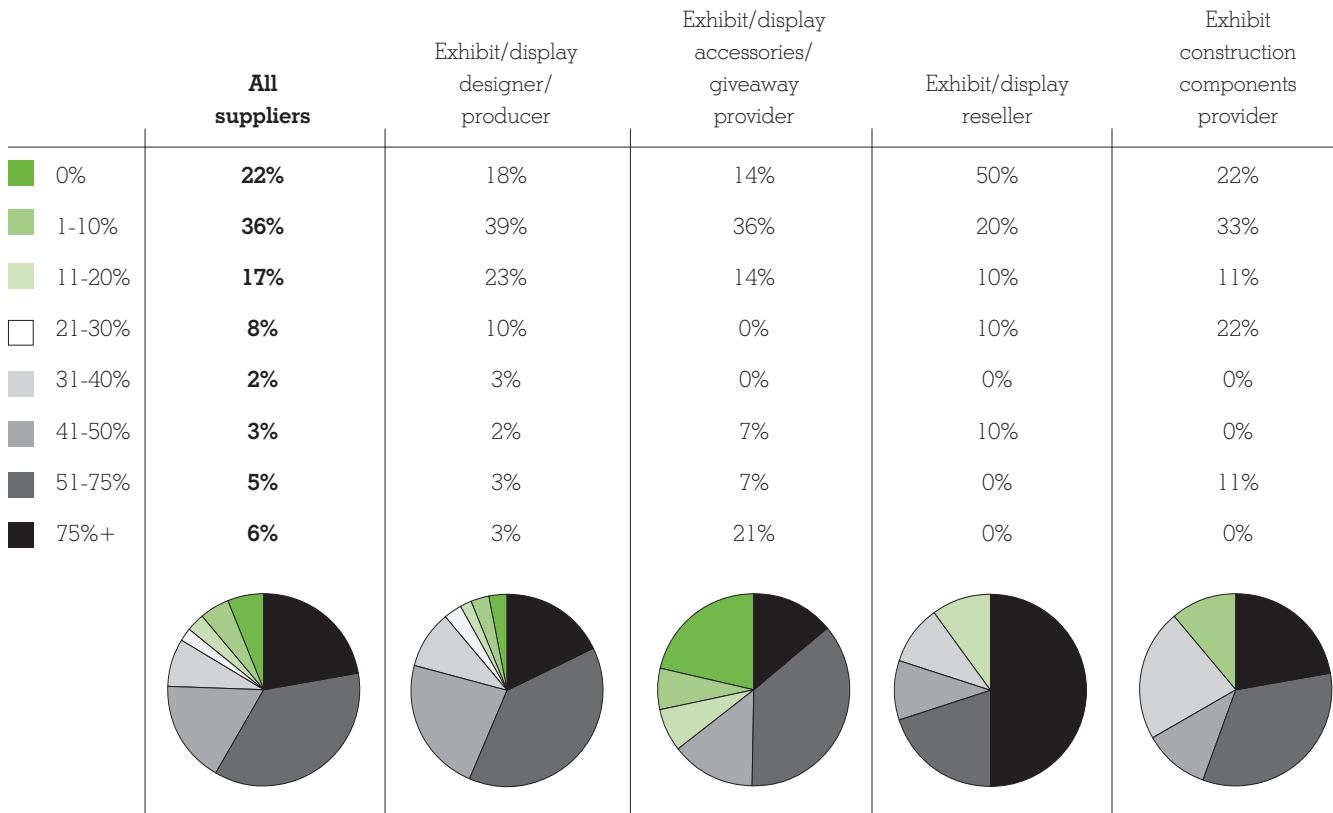
Some interesting differences in opinion exist among various segments of the survey sample. For instance:

- Women, respondents 55 years or older, sales and marketing managers, and respondents representing the largest suppliers in our survey were all more likely to see the higher cost of Green options as an especially significant obstacle.
- The largest suppliers were much more likely than medium-sized and small companies to identify inferior performance of Green products as an obstacle. In fact, while performance was last among the entire supplier survey sample, it was tied for second among suppliers with revenues of more than \$50 million.
- Increased lead time was seen as a much bigger obstacle by exhibit/display designers/producers than exhib-

**FIGURE 25: Suppliers have made progress toward providing Green exhibiting options.**



**FIGURE 26: More than a third of suppliers report Green exhibiting options comprise between 1 and 10 percent of their overall sales.**



it/display accessories/giveaway providers, but much less of an obstacle by the largest suppliers in our survey.

- Supplier owners and senior executives were more likely than sales or marketing managers to view the lack of consensus on what constitutes a Green offering as a significant obstacle.

The preceding findings give some indication of what's preventing suppliers from offering a broader array of Green exhibiting options. But what about suppliers' clients? What do suppliers think is holding back exhibitors' adoption of Green exhibiting options? We asked suppliers to assume the perspective of their clients and rate, on a scale of 1=not at all an obstacle to 7=very significant obstacle, the same list of eight potential obstacles to greater exhibitor use of Green options about which we asked exhibitors themselves. In suppliers' minds, exhibitors are stymied most by the generally higher prices of Green options compared with traditional options (which received a mean rating of 5.25), followed by lack of variety in Green materials currently available (4.91), lack of consensus on what constitutes Green options in the exhibiting world (4.88), too small of a supplier pool providing Green options (4.76), lack of metrics to quantify the business

impact of Green exhibiting (4.45), and lack of Green options to meet clients' requirements (4.47). At the bottom of the list was client management's general disinterest in Green options (4.14) and substandard performance of Green options compared with traditional options (3.75).

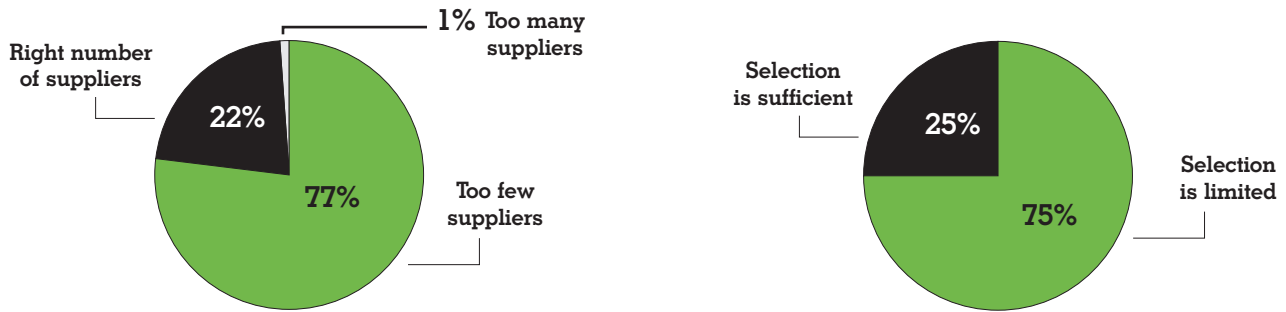
Executives representing the largest suppliers in the survey were much more likely to see lack of metrics, higher prices, lack of variety, substandard performance of Green options, and client management's general disinterest in Green options as significant obstacles.

Since supplier executives believe lack of consensus on what constitutes a Green option is an obstacle to broader adoption, it's no surprise that a majority — 55 percent — are in favor of an industry-wide certification standard for Green exhibiting options. This sentiment was largely consistent across respondent titles, gender, and age, as well as across company sizes and types of suppliers.

## The Role of Price in Purchasing Decisions

Clearly, price is an obstacle to increased adoption of Green exhibiting options. To further probe respondents on the price issue, we asked supplier

**FIGURE 27: Suppliers believe there are too few suppliers of Green raw materials and products.**



executives to tell us what their clients expect to pay for Green options today. Just slightly more than half said their clients anticipate paying more than what they pay for traditional options, while 46 percent said their clients expect Green options to cost the same as traditional options. Among those who said clients expected an added charge for Green, the average premium that supplier executives said clients anticipated was 19 percent. However, when viewed by supplier size, that average premium ranged from a low of 10 percent among respondents at the largest companies in the survey to a high of 26 percent for executives at companies in the \$6 million to \$10 million revenue range.

The preceding is perception. So what about reality? We asked supplier executives how the prices of their Green options actually compare with traditional alternatives. We discovered that nearly three-fourths of suppliers charge more for Green — an average of 26 percent more. Suppliers with revenues between \$11 million and \$51 million had the highest average premium for Green (33 percent), while suppliers with more than \$51 million in sales had the lowest (18 percent). Suppliers of exhibit/display accessories/giveaways reported an average premium of 30 percent, compared with 25 percent for exhibit/display designers/producers, and approximately 22 percent for exhibit/display resellers and exhibit construction components providers.

## Greenness Factors Influencing Exhibitors' Purchase Decisions

Although obstacles such as price can inhibit exhibitors' adoption of Green options, other factors can play a role in positively influencing exhibitors' decisions to purchase Green options over traditional ones (**Figure 29**). We asked supplier executives to consider a list of 11 Greenness factors and rate them in terms of how

important each was to their clients' decision to do business with their company on a scale of 1=not at all important to 7=extremely important. Topping the list was having products designed to be more efficient to ship, with a mean rating of 5.25. Close behind were four other product-related factors: the products have a sustainable design that promotes reuse of components (4.93), do not contain harmful or toxic ingredients or components (4.81), are not made from materials that are endangered or in short supply (4.70), and are designed to consume less material overall (4.59).

In the bottom half of the list are mainly factors related to the processes and operations through which products are made: the use of hybrid or fuel-efficient vehicles (2.88), manufacturing processes that consume less energy and resources or produce less harmful waste (3.67), the reclaiming or recycling of a substantial portion of the wasted generated by the company's manufacturing operations (3.78), and facilities that conserve energy or water (3.91). Two product-related features also are in the bottom half of the list: products that are recyclable themselves (4.08) and products made from recycled materials (3.81).

And how are suppliers faring in addressing these factors, especially those they see as most important to clients' decisions to do business with them? We presented the same list of Greenness factors and asked suppliers to rate their performance on each, using a scale of 1=no progress to 7=substantial progress. We found that the vast majority of supplier executives believe their companies have made, on average, only slight progress on each (**Figure 29**). For instance, on the five most important Greenness factors, the average progress rating ranged from a low of 4.54 to a high of just 4.88. Interestingly, although the data only indicates slight progress, the most important factor (products that are designed to be more efficient to ship) received the highest progress rating. Similarly, the two least-important factors had the lowest

progress ratings, indicating that suppliers appear to have a good handle on their priorities.

These findings demonstrate that suppliers know they have work to do to meet the needs of their clients — a situation reinforced by the fact that only 36 percent of supplier executives felt their clients are satisfied or very satisfied with their company’s Green options. And perhaps this relative lack of satisfaction is the reason why only 23 percent of supplier executives said their company receives preferential treatment from clients because of the company’s Green offerings while 42 percent do not (an additional 35 percent of participants didn’t know or chose not to answer). For those that do get better treatment, it’s most often in the form of “favored supplier” status, followed by additional consideration in a request for proposal.

## Leaders and Laggards

As noted elsewhere in this report, our survey found that Green options are not widely available across suppliers of exhibiting products and services.

However, there is a group of suppliers in our survey — we’ll call them the “Green leaders” — that reported having made substantial progress in providing Green products and services. These companies range from small to large in terms of overall revenues, and are predominantly from the display designer/producer segment of the industry.

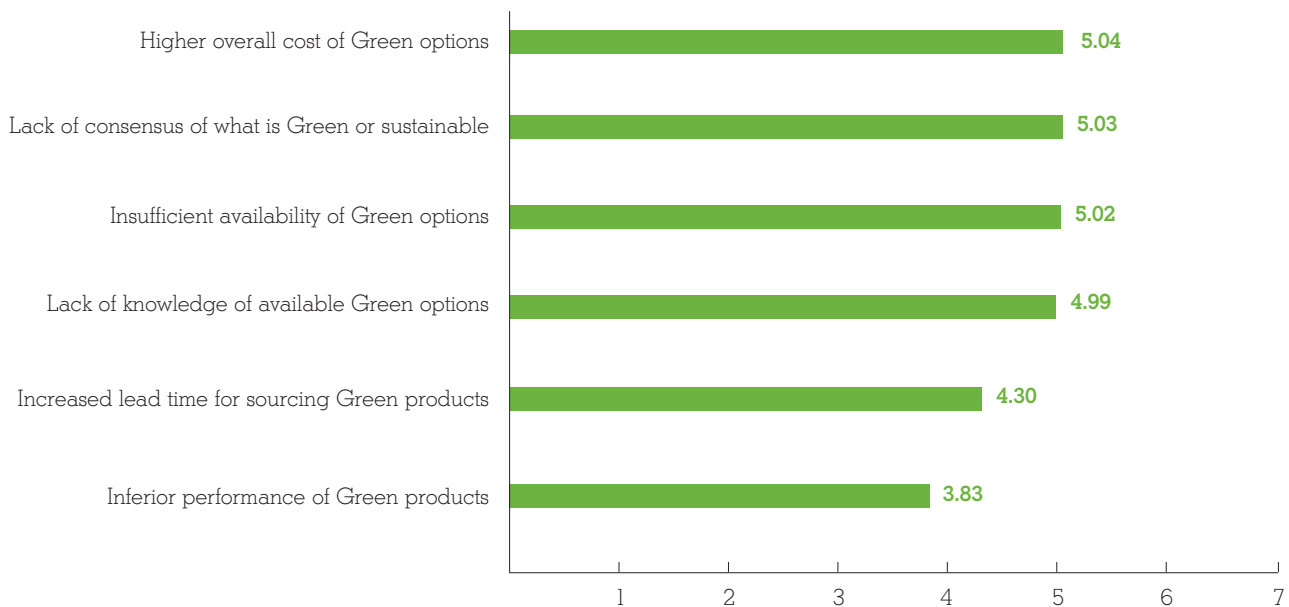
Leaders account for 22 percent of our supplier sam-

ple and provide an interesting point of contrast with the other groups of suppliers: those that have only taken some initial steps toward providing Green alternatives, those that have made moderate progress in the Green arena, and those that haven’t considered Green options (the last of which we’ll refer to as the “Green laggards”).

For instance, Green leaders are much more likely than Green laggards to be represented by executives who reported a high personal level of interest in Green exhibiting options as well as high interest across the company overall. Furthermore, 92 percent of executives representing Green leaders, compared with only 14 percent of those representing laggards, consider themselves a champion of Green initiatives in their company. While arguably intuitive, these findings illustrate a strong correlation between interest in Green options among a company’s people and a company’s ability to take tangible strides in making such options a reality.

Also illustrating the “walking the talk” mentality of Green leaders is the fact that 83 percent of these companies have formalized Green initiatives in their organizations, and in 95 percent of them, those initiatives are company wide (as opposed to targeting specific departments, operations, or product lines). Additionally, 43 percent of leaders said between 91 percent and 100 percent of their product line is Green. In other words, the amount of progress a supplier is making in providing

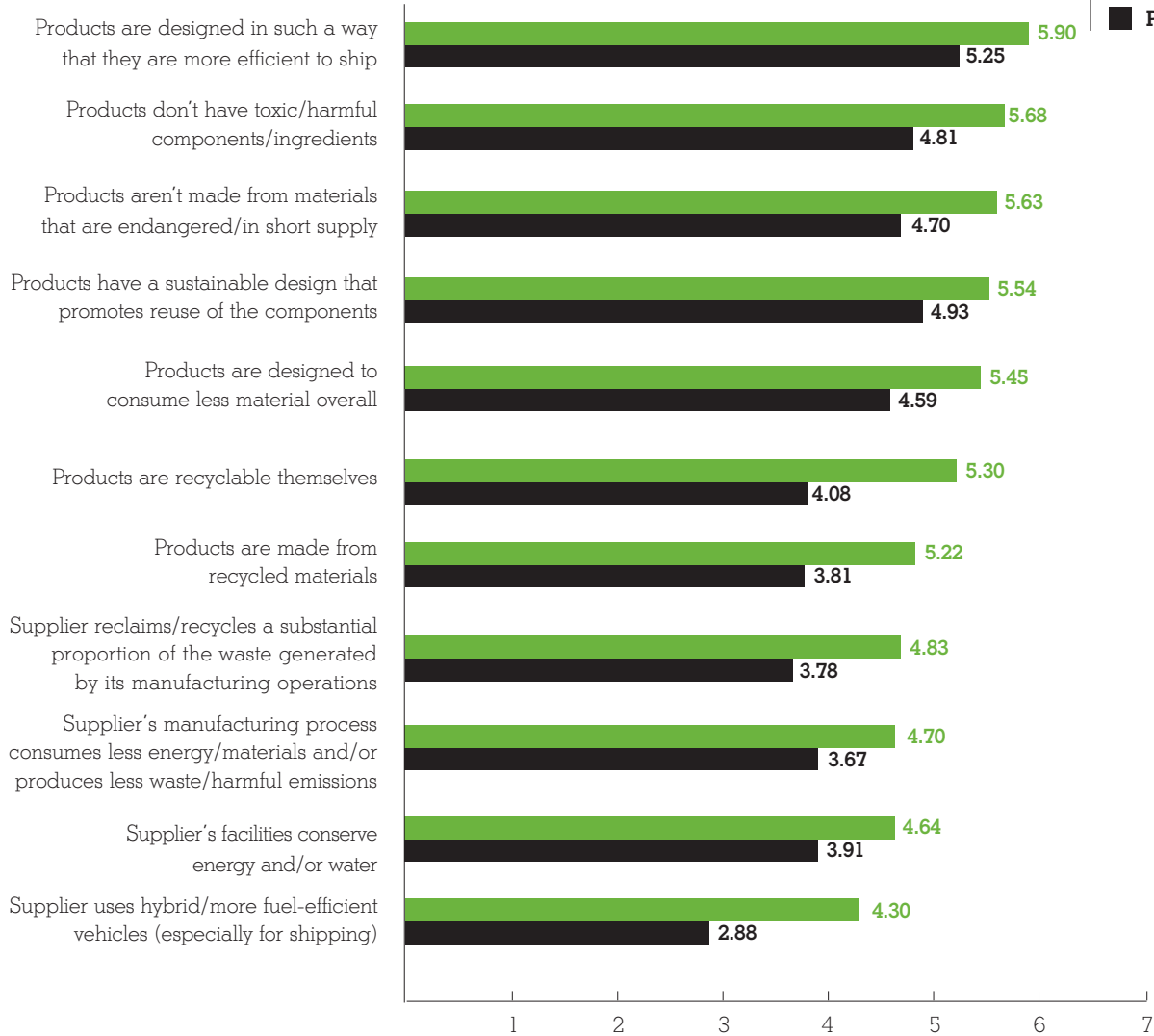
**FIGURE 28: Several factors are preventing suppliers from offering additional Green exhibiting options.\***



\*MEAN RATING ON A SCALE OF 1=NOT AT ALL AN OBSTACLE TO 5=VERY SIGNIFICANT OBSTACLE

**FIGURE 29: Suppliers are making progress on important Greenness factors.**

**Key**  
■ Importance\*  
■ Progress\*\*



\*MEAN RATING OF SUPPLIERS' VIEW OF IMPORTANCE OF FACTOR ON A SCALE OF 1=NOT AT ALL IMPORTANT TO 7=EXTREMELY IMPORTANT

\*\*MEAN RATING OF SUPPLIERS' VIEW OF PROGRESS IN ADOPTING THE PRACTICE ON A SCALE OF 1=NO PROGRESS TO 7=SUBSTANTIAL PROGRESS

Green options appears to be tightly linked to the scope of their efforts: Broader scope generates more progress.

Not all leaders have infused Green options so thoroughly across their product lines. But on average, leaders said 75 percent of their product line is theoretically convertible to Green, and an overwhelming 96 percent indicated they believe they will meet that goal. Compare that with the figures for the laggards, who feel that only 28 percent of their product line is theoretically convertible to Green — and 57 percent of which said they did not believe they would achieve that goal.

Importantly, Green leaders have experience behind them: 50 percent of leaders — vs. 12 percent of those having made moderate progress and 7 percent of those having taken only initial steps — have provided Green exhibiting options for more than four years. This helps

explain why one-third of leaders generate more than half of their total revenue from the sale of Green options, and an additional 20 percent said they currently generate between 31 percent and 50 percent of their total sales from Green options.

Although as a group they have made substantial progress toward providing Green options, leaders also believe they could offer more — and recognize there are obstacles to doing so. Yet leaders differ substantially from laggards in how they view the importance of those obstacles. For instance, 57 percent of laggards said the higher overall cost of Green options is a very significant obstacle to their ability to offer more Green alternatives. Just 1 percent of leaders agreed. Similarly, 43 percent of laggards compared with just 5 percent of leaders said inferior performance of Green products

is a very significant obstacle — a sentiment that is inconsistent with the broader survey finding that performance of Green alternatives is no longer a significant issue. In some respects, one could say these two responses indicate that laggards may be finding convenient excuses for their lack of progress in providing Green exhibiting options.

While both leaders and laggards view lack of consensus on what constitutes Green exhibiting options as a relatively strong obstacle to providing more Green alternatives, leaders are far more likely than laggards to be in favor of one solution to that problem: an industry-wide certification standard for Green exhibiting options.

Leaders and laggards also fail to see eye to eye on the importance of various “Greenness factors” that influence exhibitors’ decisions to do business with them. Of the 11 factors we studied, 10 were rated, on average, as much less important by laggards than leaders — and nearly all by a substantial margin. This probably reflects laggards’ lack of meaningful exposure to Green options, given that, by definition, this group has not even considered providing Green alternatives. Conversely, having been in the game for several years, leaders are more likely to have had many discussions with clients about what is important to them in a Green exhibiting option — a situation that probably contributed to the fact that 56 percent of leaders said their clients are either satisfied or very satisfied with their Green offerings.



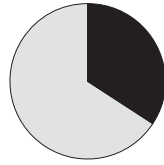
# III. Methodology and Demographics

Exhibitor Magazine Group and The Bloom Group sent two e-mail invitations to a random list of individuals from EXHIBITOR's subscriber base in August and September of 2007. One invitation was directed toward individuals who work at companies that purchase exhibit products and services ("exhibitors") and the other was sent to individuals representing suppliers of such solutions ("suppliers"). Each invitation contained a link to the online survey questionnaire developed for that recipient's respective grouping. We received a total of 498 completed surveys from exhibitors and 110 from suppliers. The exhibitors represented a wide spectrum of industries, while most suppliers surveyed (57 percent) were designers or producers of exhibits or displays. In the charts on the following pages, we present a breakdown of the demographics of both survey samples.

# A. Exhibitors

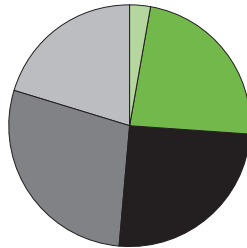
## Respondent Gender

■ Male	34%
■ Female	65%



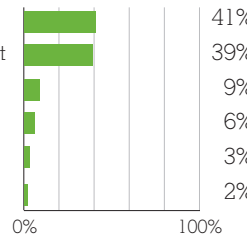
## Respondent Age

■ Under 25	3%
■ 25-34	23%
■ 35-44	25%
■ 45-54	28%
■ 55+	20%



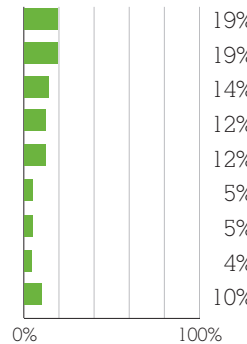
## Respondent Title

Exhibit/event manager/coordinator	41%
Marketing/sales/advertising management	39%
Owner/president/partner	9%
General management	6%
General marketing	3%
Other	2%



## Type of Company

Consumer products/hospitality	19%
Industrial/manufacturing	19%
Electronics/high-tech	14%
Medical/healthcare	12%
Professional services	12%
Construction	5%
Financial services/real estate	5%
Government	4%
Other	10%



## Size of Respondent Company by Revenue

Up to \$1M	10%
\$1M-9M	26%
\$10M-50M	24%
\$51M-100M	10%
\$101M-250M	8%
\$251M-500M	5%
\$501M-1B	4%
\$1B+	12%



## Annual Trade Show Budget

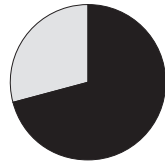
Up to \$50K	28%
\$50K-100K	18%
\$101K-200K	17%
\$201K-500K	17%
\$501K-1M	7%
\$1M+	9%



# B. Suppliers

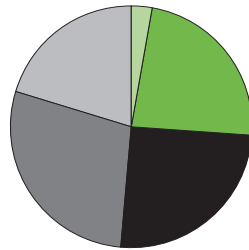
## Respondent Gender

■ Male	71%
■ Female	29%

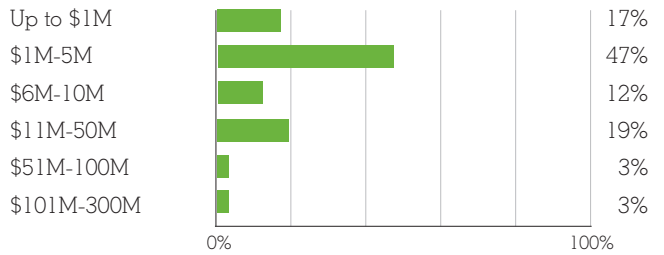


## Respondent Age

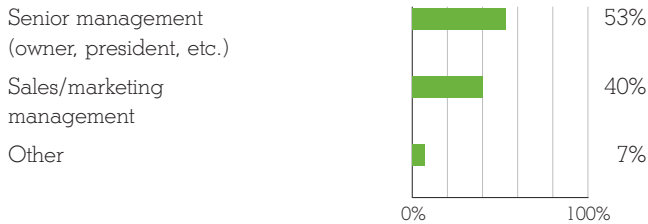
■ Under 25	0%
■ 25-34	16%
■ 35-44	32%
■ 45-54	29%
■ 55+	23%



## Size of Respondent Company by Revenue



## Respondent Title



## Type of Company

