

TREND REPORT # 1

AN **INCONVENIENT** BOOTH

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



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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 inter-

national 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.

The Green Exhibiting Initiative

This research was made possible by:

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

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.

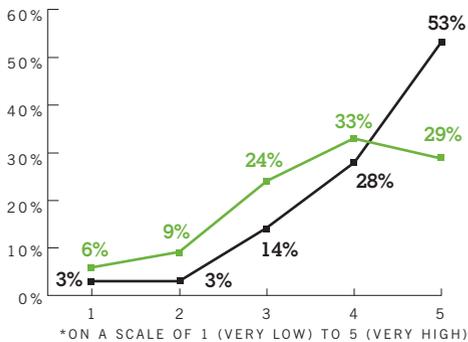
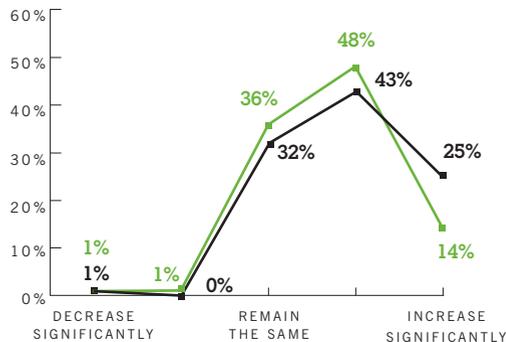
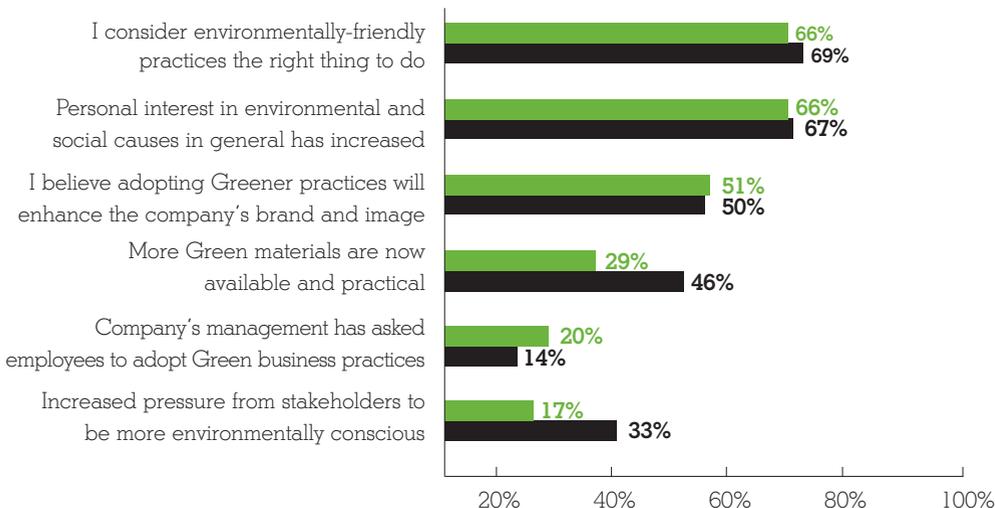


FIGURE 2:
Interest in Green exhibiting options among exhibitors and suppliers is expected to grow in 2008.



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

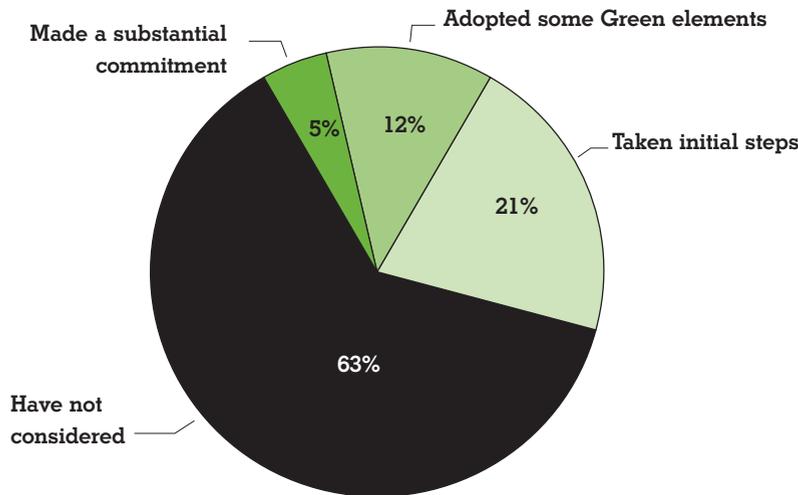
For some, the high level of personal interest has translated into active support of Green exhibiting options. We found that 35 percent of exhibitors and 59 percent of suppliers consider themselves a champion of Green exhibiting options at their companies. Compared with non-champions, champions are nearly 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 exhibitors who

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.

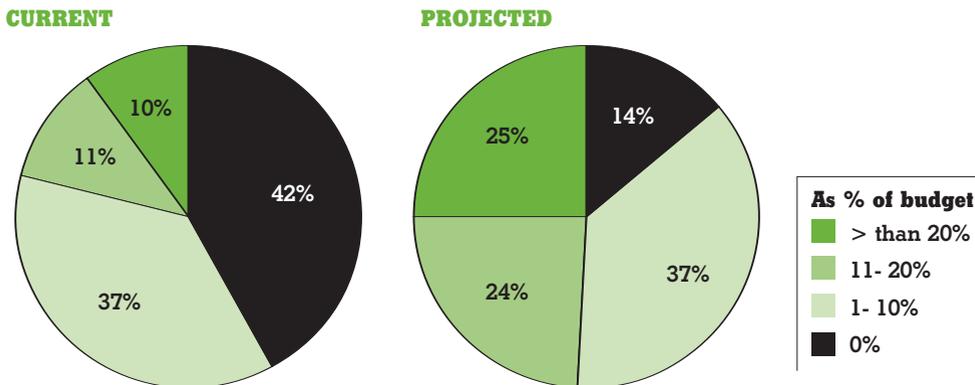
38% of exhibitors have already taken steps toward adopting Green exhibiting options.

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.

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.



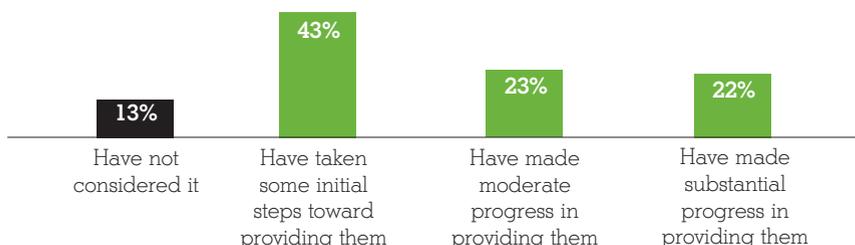
Some of this shift may be driven by the policies of the larger enterprises in which our exhibitor respondents work. We found that 46 percent of exhibitors' companies have some type of formalized Green initiative, which in 73 percent of those companies extends to the exhibit function. So while a strong 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.

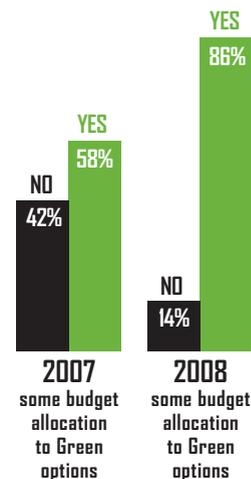
On the supplier side, measured progress also has been reported. Just under half of supplier respondents said their companies have a formalized Green initiative, which in 72 percent of those organizations is company wide. As shown in Figure 6, most suppliers have taken some initial steps toward providing 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.

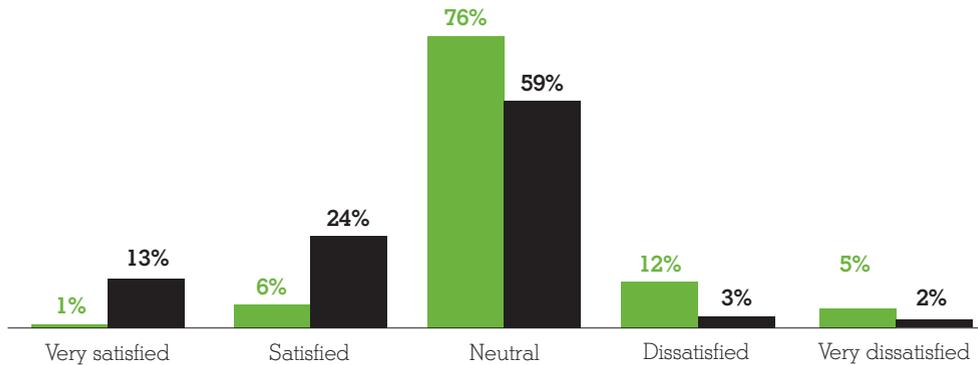


46% of exhibitors' companies have some type of formalized Green initiative, which in **73%** of those companies extends to the exhibit function.

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

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.

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

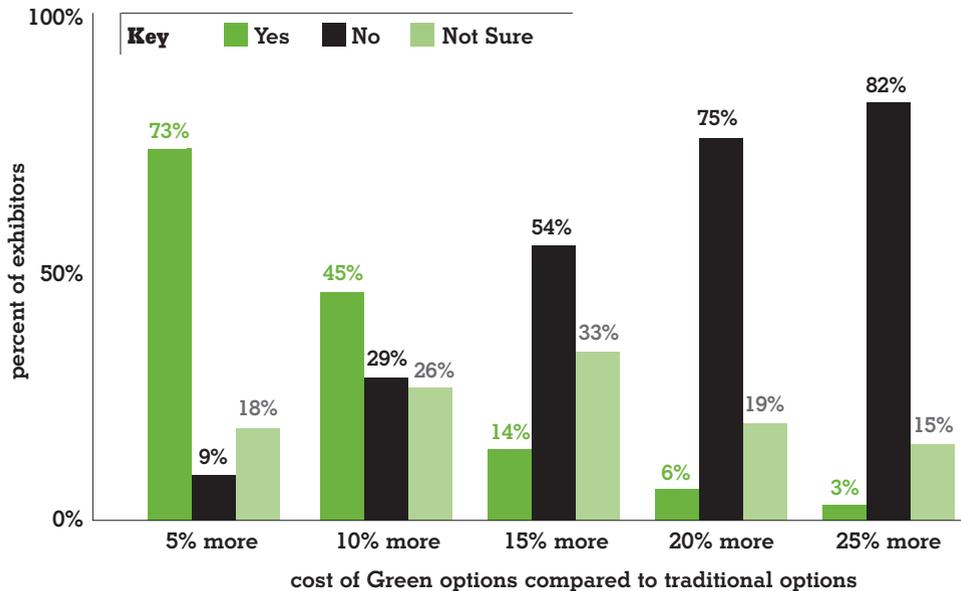
Key

- Exhibitor Satisfaction*
- Suppliers' Indication of Their Clients' Satisfaction**

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.



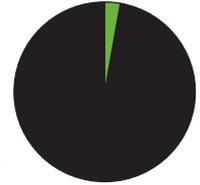
These findings provide considerable evidence that price thus far has been an inhibitor to more widespread adoption of Green exhibiting options. And until the price gap between Green and traditional options is reduced to below exhibitors' psychological threshold, adoption is likely to remain slow among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



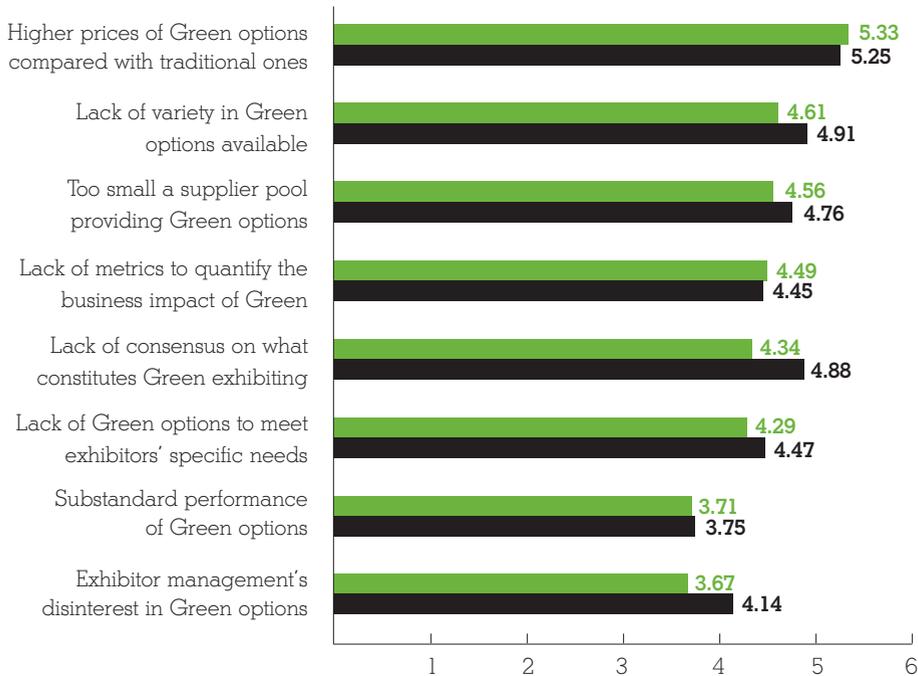
3% of exhibitors are willing to pay a premium of 25 percent or more for Green exhibiting options, while vendors report that Green products, on average, cost 26 percent more than traditional options.

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 SCALE OF 1=NO 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 5.0: 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.

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 difficult for suppliers to populate

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.

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 or materials or produces less waste; and suppliers reclaim or recycle a substantial portion of the waste generated by their manufacturing operations.

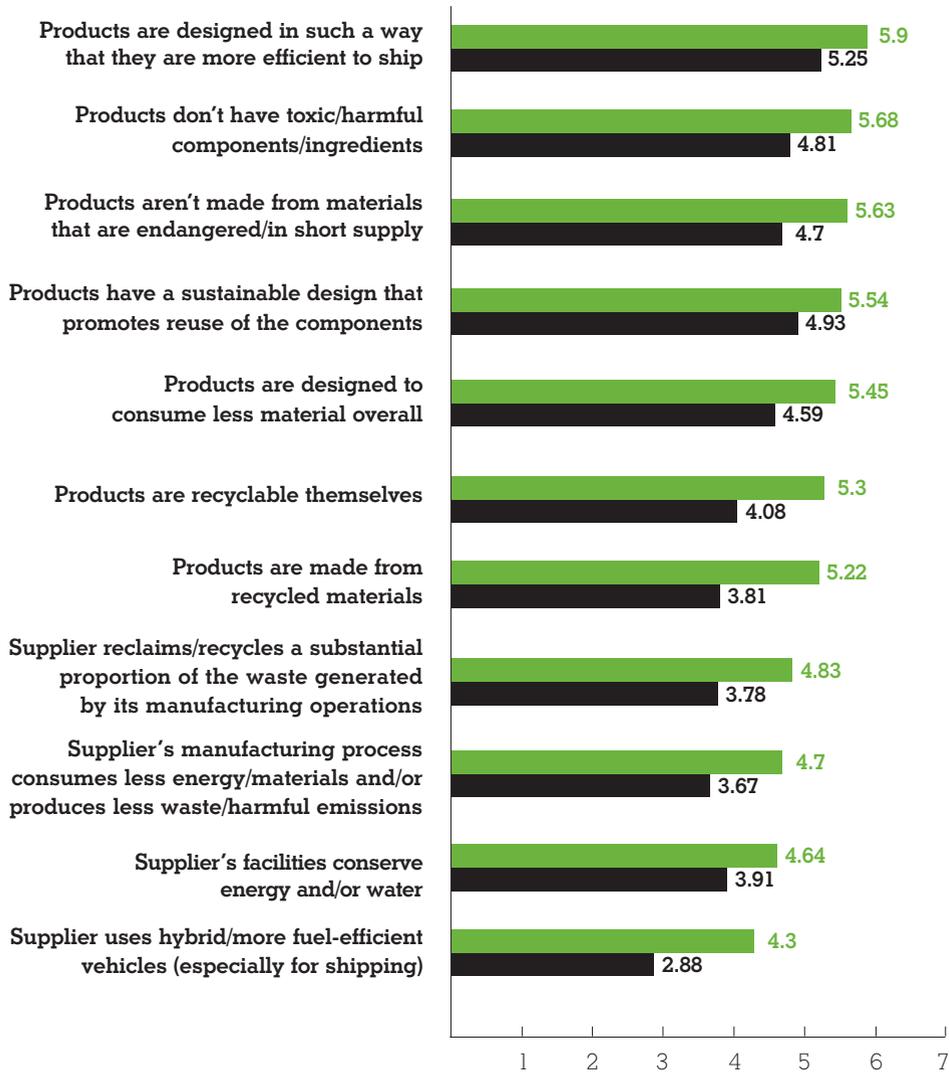
When deciding what's Green, exhibitors care less about how environmentally friendly the operations are of the company that produced the product and more about the material used to make the product.

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

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.

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 SCALE OF 1=NO IMPORTANCE AT ALL TO 7=VERY HIGH IMPORTANCE

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

Key
■ Exhibitors
■ Suppliers

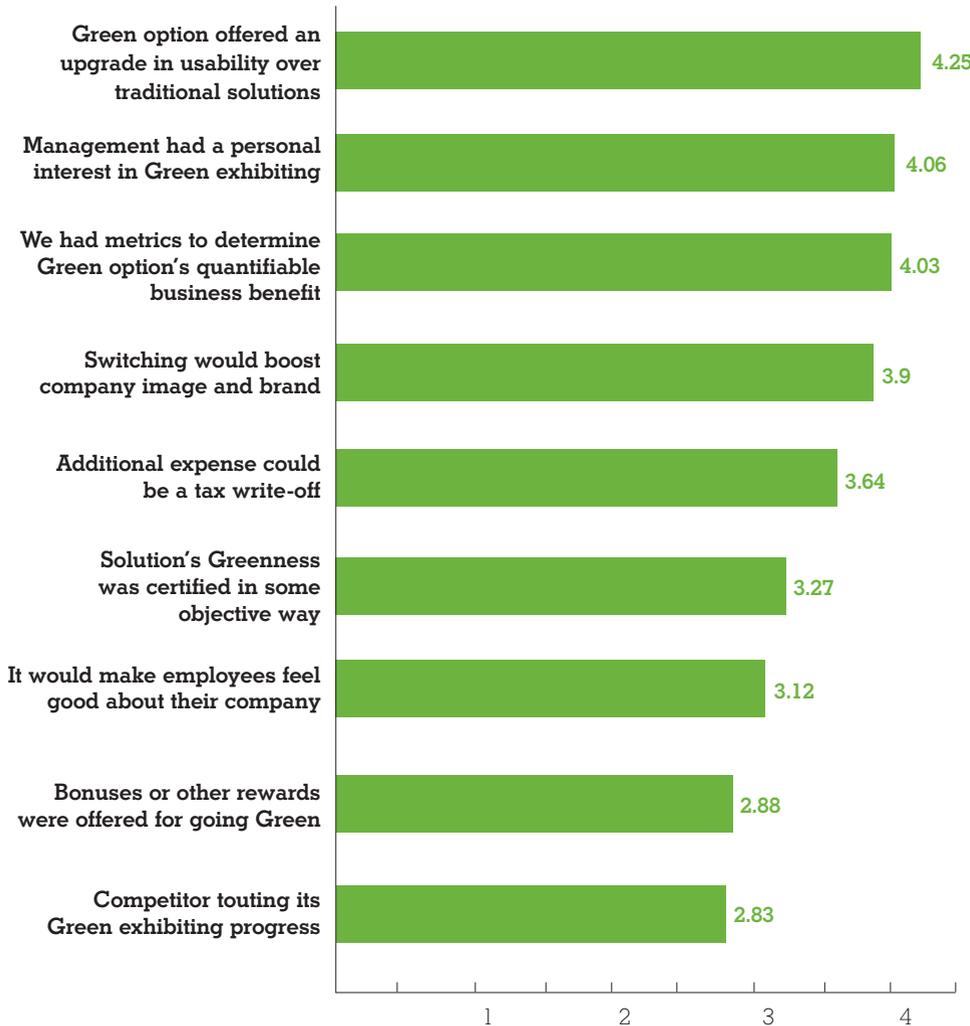
Several Incentives Could Influence Exhibitors to Switch to Green Options

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.

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.

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

AN INCONVENIENT BOOTH

For a copy of the full survey report, visit: <http://www.exhibitoronline.com/greensummary.asp>

METHODOLOGY

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.