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YEAR

A Supplement Of
Convention South

Buyers' Market Goes On

**More Meetings,
Lower Rates &
All The Top Trends**

EVENTS

ATTENDANCE

RATES

**2010 Meeting Trends
In The South Report**

The Buyer's Market Goes On...

More Meetings, Lower Rates & Other Top Trends

By Marlane Bundock

Positive signs that the meetings industry is strengthening are emerging from this year's *ConventionSouth's* Meeting Trends in the South Report, which investigates current trends and future forecasts.

Bottom line data show that meeting planners have encountered a degree of professional hardships within the past 12 months; however, going into 2010, most predict the next 18 months will produce business growth with more events held and higher attendance rates.

The report is compiled from a 100-plus-question survey of meeting professionals who organize all or a portion of their events in the South. The survey was conducted in September in collaboration with PKF Hospitality Research, the Atlanta-based research affiliate of PKF Consulting, which specializes in the hospitality industry.

When survey participants were asked about their expectations for the health of the meetings

industry within the upcoming 18 months, 44 percent expect it to improve, while 44 percent said they expect it to stay the same as this year.

In comparison, only 18 percent of respondents to last year's trends survey—issued in October 2008—expected meetings industry growth in 2009. A similar *ConventionSouth/PKF* survey conducted in February 2009 showed more pessimistic results with 80 percent of respondents expecting the health of meetings industry to deteriorate in 2009 compared to 2008.

Fast forward to the latter half of this year and the results are showing signs of positivity, said Robert Mandelbaum, director of research information services for PKF Hospitality Research. “After leveling out at the bottom in 2009,” he

said, “an equal number of planners expect overall market conditions to be the same or better in 2010.”

Mandelbaum reviewed the survey results last month. “Expectations for further deterioration in market conditions have lessened,” Mandelbaum continued. “Next year, the majority of respondents expect the count of events to remain the same as 2009 or grow, so it appears that the market has reached the bottom and has stabilized.”

In light of the prickly obstacles meeting planners faced in 2009, 58 percent responded that the number of meetings their organization held in 2009 remained the same as in 2008. What's more, 13 percent of respondents noted a jump in the number of meetings planned for 2009.

The year ahead looks even more promising with 66 percent preparing to plan the same number of meetings in 2010 and 24 percent

76%
of respondents
use industry
magazines as
their top resource
for professional
development.

looking to plan more meetings in 2010.

John Rader, director of industry and educational services for SMC3, a transit technology company, is one of those planners who said he expects to organize more events in 2010 and is also planning to deliver attendees “more ambitious seminar programs.” Rader said low attendance rates forced cancellations of some meetings in 2009 and resulted in a total of six meetings planned for the year; however, he noted that next year looks promising. “The strength of the meetings industry will turn as the economy turns and companies have funds available for meetings and events,” he said.

The exhibition side of the industry is also showing positive results with more than 78 percent of all respondents planning the same number or more trade shows in 2009 as they did in 2008. For 2010, 93 percent expect that the number of exhibitions they will plan will stay the same or increase.

In 2010, 44 percent expect their attendance rates to hold stable, and 38 percent expect it to increase. “In 2009 and 2010, attendance has surpassed expectations for more planners as opposed to falling below expectations,” Mandelbaum said. “This is opposite to what occurred in 2008.”

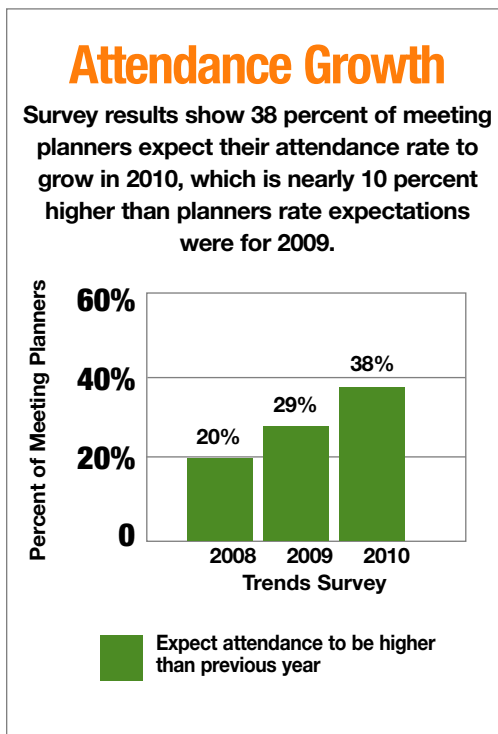
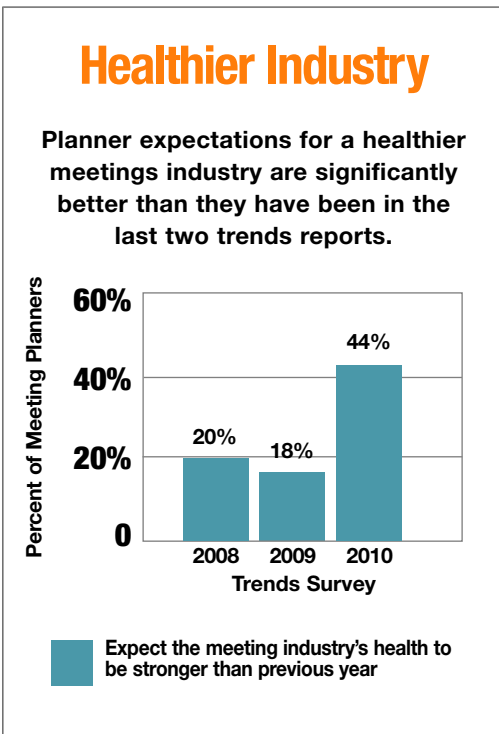
With 40 percent of the respondents representing the association market, these optimistic results are not surprising to survey participant Bobbie Jo Moore, a meeting planner for the Southeastern Surgical Congress. “Our meetings are not getting smaller, they are growing,” Moore said. “We’ve had the largest number of abstracts submitted for the 2010 meeting since 1998. The 2009 meeting had the largest attendance ever at 491 registrants, and we are expecting to reach more than 500 in 2010.”

Organizations such as the Southeastern Surgical Congress continue to find that meetings and events are a valuable part of their

Survey Respondents Work For A Variety Of Organizations...

- 42% - Association
- 21% - Government/Nonprofit
- 20% - Corporate
- 8% - Independent
- 9% - Other

operations’ success. In fact, 26 percent of the respondents reported that the meetings aspect of their organization played a more important role in their overall success compared the previous year. Meanwhile, the majority of respondents—nearly 70 percent—said 2009 meetings provided similar returns on the organization’s success as compared to 2008. ➤



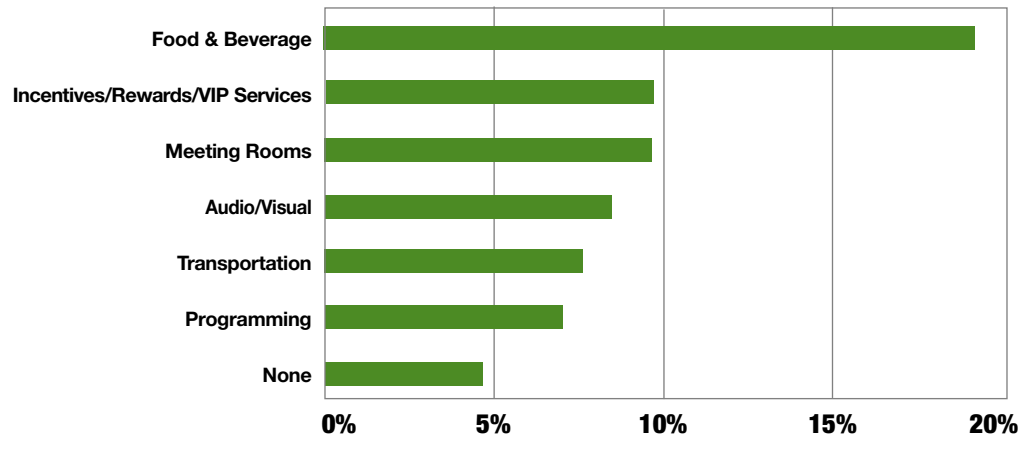
Respondents' Profile

We asked survey respondents to share a portion of their responsibilities with us:

- 42% plan more than 10 meetings or events a year.
- 67% have an average attendance rate of 100 or more at each meeting.
- 50% book more than 400 hotel room nights in 2009.
- 39% have an average per-meeting expenditure above \$75,000.

Where Meeting Planners Are Cutting Costs

Percent of meeting planners who said they are being asked to limit spending on the following areas:



How Planners Have Trimmed Their Budgets

Despite expectations for growth in 2010, planners continue to tighten their belts and are organizing events with less funds, according to the trends report.

The majority of respondents, 43 percent, say their expenditure per meeting decreased from 2008 to 2009, while a solid 40 percent say it stayed the same.

On a more positive note, next year shows promise with planners as a whole—83 percent—reporting that their expenditure per meeting will at least be the same as this year or perhaps grow somewhat. Food and beverage, guest rooms/housing, and off-site events or parties are the top three areas where planners said they are trimming budgets.

All in all, budgets are stabilizing, Mandelbaum said. “After reductions in 2008 and 2009, planners’ budgets appear to have stabilized, albeit at low levels, and further reductions are not anticipated.”

79%
of respondents
say they expect
their expenditure
per meeting
will hold stable or
increase in 2010.

Planners Negotiate As Suppliers Cook Up The Deals

Planners such as Rader said his organization has instituted more strategic budgeting techniques in order to limit expenditures on meetings. Part of the plan is to aggressively negotiate with suppliers and take advantage of the incentive packages suppliers offer groups, he said.

According to PKF, the hospitality industry continues to lower rates in order to accommodate planners’ needs. “In order to live within the restrictions of the lower budgets, planners are looking for hotel room rate concessions, and hotel managers appear to be negotiating and discounting,” Mandelbaum said, noting that hotel and venue concessions are expected to continue as a trend through-out 2010.

In a deeper look, survey participants said guest room rates is the top contract line item that they are able to negotiate pricing for, followed by meeting space rates, attrition fees, food and beverage services and rates, and cancellation fees.

In October, *ConventionSouth* reported on the wealth of incentives and discounts suppliers are offering meetings and groups. In the article, David Marr, senior vice president of brand management, North America for Starwood Hotels and Resorts Worldwide, said meeting planner incentives stimulate the industry. “We understand that our customers’ budgets are tighter than ever, and ultimately the more value we provide them, the more likely they are to proceed with their meeting programs that support their business growth,” Marr said.

Many of these incentive programs are expected to continue within 2010. For example, Marriott International’s Texas Meetings Matter promotion states, “Book a meeting or event with at least 50 cumulative room nights by Aug. 31, 2010, to actualize by December 2010 and receive 25 percent

Top Destination Selection Factors

Here are the top 5 areas respondents said are most important when choosing a meetings destination:



Overall Affordability



Drive Access



Air Access



Relationship with CVB



Nearby Amenities & Attractions

allowable attrition, one complimentary room for every 35 rooms booked and up to 50,000 Marriott Rewards bonus points.”

For more information on the promotion, which is valid at participating Marriott-brand hotels within Dallas, Houston and San Antonio, visit ConventionSouth.com's “News Headlines” section.

Additional supplier promotions can be found on ConventionSouth.com's “Hot Deals” and “Hot Dates” section.

An article on page 28 describes the group's trend of falling room rates within the hospitality industry. Within the article, PKF's Mark Woodworth said, “The practice of price discounting has firmly taken hold, and as a result, room rates are expected to decline once again in 2010.”

Planners Look For Meeting Sites That Won't Break The Bank

Half of the survey participants to this year's meetings trends report are making more strategic decisions about where their groups meet. Hot dates, special deals and meeting rewards are driving much of the decision-making process with 55 percent noting it as an important factor in the booking process. Plus, nearly a quarter of the respondents said that due to price reductions, they have booked meetings for 2009 or 2010 at hotels/facilities that were previously thought too pricey for their budget.

Furthermore, overall affordability was rated by all but 13 of the respondents as being critical to deciding what venue to choose. Specifically, hotel room rates top the list of critical site selection factors with 83 percent rating it as a critical factor, followed by a property's willingness to negotiate at 81 percent, the price of the meeting venue at 76 percent, and attrition rates at 65 percent.

Also worth noting, more than 43 percent said complimentary services are critical to site selection decision making. ➤

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Where Groups Are Meeting

69%

of respondents said that
hotels

continue to be the most popular venue for meetings and events, followed by convention centers.

The most popular types of hotels are located downtown, near a conference or convention center, or a coastal resort. ■

Luxury For Less

Have you “traded up” hotels— or selected a property that was typically too pricey—due to recent price reductions?



22% - “Yes!”

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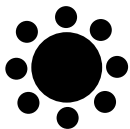
Planners Say Suppliers Are Cutting Costs

Meeting pros were asked:
For which of the following items are
hoteliers most willing to make concessions?



64%

Guest
Room Rate



49%

Meeting Space
Rental Fee



44%

Food &
Beverage Cost



37%

Attrition
Penalty Fees



24%

Cancellation
Fees

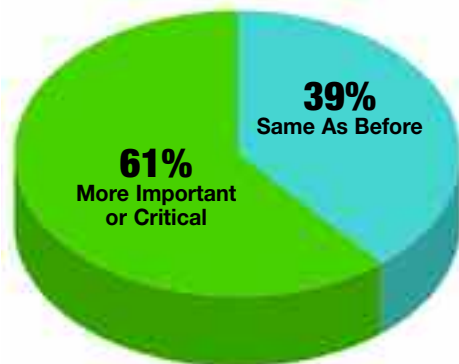
Access to the venue continues to be top of mind to respondents with 47 percent rating air access as a critical factor to site selection and 53 percent rating drive access as a very important factor to deciding where they book. Nearly 35 percent of planners are also considering smaller destinations over first-tiered destinations in light of the current economy. Nearly 30 percent said their destination of choice has become more regional in nature. Association meeting planner Bobbi Jo Moore noted, “We are starting to use second-tiered cities. They

offer all that we need at less cost, both to us and our registrants.”

More than just cost and location, the relationship with the venue representative received high marks as a deciding factor in booking sites with 87 percent noting it as an important factor. Likewise, 76 percent say their relationship with the convention and visitors bureau is important in selecting a destination. Another important factor in site selection includes nearby amenities and attractions with most rating it as important or slightly important.

Eco-Friendly Meetings

In 2009, compared to 2008,
how important to your organization
is it to hold meetings that are
environmentally friendly?



Trends Report Mirrors National Findings

ConventionSouth's Meeting Trends In The South Report mirrors what officials and experts in the U.S. travel industry as well as the meetings industry are also predicting—growth is expected in 2010.

In October, travel leaders gathered in Little Rock, Ark., for the U.S. Travel Association's annual Marketing Outlook Forum.

At the forum's wrap-up, Senior Vice President of Research for the U.S. Travel Association Dr. Suzanne Cook reported that leading economic indicators are returning to positive growth—good signs for the travel industry—though most economists agree that a “new normal” is evident.

Geoff Freeman, U.S. Travel Association senior vice president, said factors that include the recession, a spurt of public anger over extravagant business travel and politicians who lashed out at the travel industry resulted in \$2 billion worth of events and meetings being canceled in 2009. However, as travel industry leaders have pushed the messages that “meetings matter,” positive signs of a turnaround are expected, Freeman said.

Christine Duffy, president and CEO of Maritz Travel Co., also presented at the forum and said that meetings are a tool for keeping “employees engaged and motivated. Sales and marketing executives know they have to get back in front of their people.”

In a June survey issued to members of the Professional Convention Management Association (PCMA) as well as American Express association and corporate meeting planners, six out of 10 respondents expect to book more or the same amount of off-site meetings in 2009/2010 compared to the number they booked in 2008. Of those, the majority expect to book the same number of off-site meetings in 2009/2010 compared to 2008.

Those who expected a decrease in the number of events held in the last half of 2009 and in 2010 cited several reasons, including reduced budgets due to general economic conditions as well as image, publicity and public policy considerations.

“These results further underscore the need for companies to be more strategic and transparent in their meetings programs by finding ways to better quantify the return on their meetings investment and participant experience,” said Issa Jouaneh, vice president of Strategic Meetings Management and Planning for American Express Business Travel. “Consolidation of spend, greater transparency and accountability will be key to positioning companies for success as the economy begins to return.” ■

Hospitality Industry To Recharge In 2010, Yet Room Rates Continue To Fall

By Marlane Bundock

According to officials with PKF Hospitality Research (PKF-HR), nine consecutive quarters of declining lodging demand will come to an end in the second quarter of 2010.

“The recovery of lodging demand is an important milestone that will be reached in the year ahead,” said R. Mark Woodworth, PKF-HR president.

“The catch, however,” Woodworth said, “is that the practice of price discounting has firmly taken hold, and as a result, room rates are expected to decline once again in 2010.

“In an environment with all-time record low occupancy levels, the pressure on hotel operators to discount their room rates is significant,” he said. “Nine consecutive quarters of year-over-year reductions in room rates (fourth quarter 2008 to fourth quarter 2010) is great news for travelers but a major

cause of concern for hotel owners and their lenders.”

At the same time, PKF predicts that travelers will continue to be discriminating with their spending. “The price paid for a room will remain the most important criteria for most travelers in 2010.”

Smith Travel Research (STR) reports that across the United States, 2009 occupancy rates will be down overall 8.4 percent to 55.4 percent compared to last year, and the average daily rate (ADR) for a room will decline 9.7 percent to \$96.43, said Mark Lomanno, STR president.

The outlook for 2010 looks slightly better

than 2009, but the industry is expected to end 2010 with declines in key metric areas.

Occupancy is projected to end the year with a 0.6 percent decline to 55.1 percent; ADR is forecasted to decline 3.4 percent to \$93.16; and RevPAR is expected fall 4 percent to \$51.26.

Supply and demand in 2010 are both projected to end the year with positive growth, Lomanno said. Supply is predicted to grow by 1.8 percent and demand is expected to rise 1.3 percent, across the country. PKF-

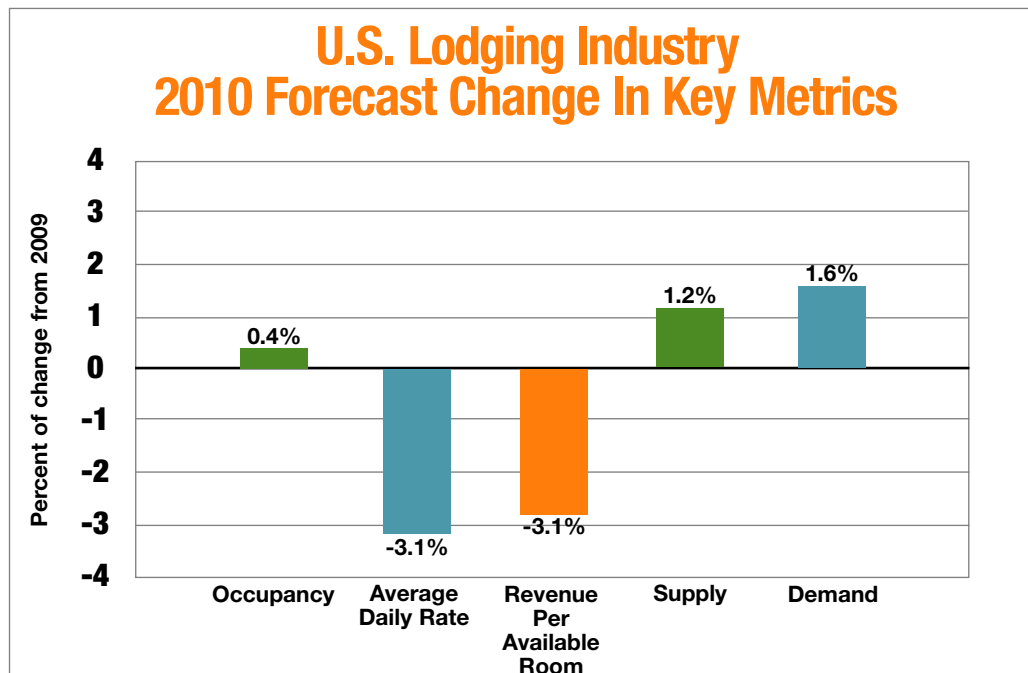
HR’s expectations for 2010 is illustrated in the graph below.

In Orlando, Fla., one of the South’s top meetings and convention markets, hotel room rates were slashed to an average of \$76.06 in September, according to a monthly report by STR. However, September tends to be a slow month for Central Florida hotels even during good economic times, said Michael Terry, a professor at the University of Central Florida’s Rosen College of Hospitality Management, who emphasized during this time that students are back in school and the convention scene is quiet.

Similarly, in Northeast Florida, the average room rate in Jacksonville was reported to hit \$68.49 in August, an 8 percent decline from the previous year and a 22 percent decline from 2007 when average rates were at \$87.63. ➤

“...the practice of price discounting has firmly taken hold, and, as a result, room rates are expected to decline once again in 2010.

—Mark Woodworth,
PKF Hospitality Research



In an October article in *The Virginian-Pilot*, in Norfolk, Va., Raj Randeria, a partner in Aniesh Corp., which owns and operates four hotels in Hampton Roads including the Norfolk Plaza Hotel, said, “In this economy, people are looking for better deals.” As a result, he noted, hoteliers are dropping prices, especially to undercut competitors.

In neighboring West Virginia, room rates at The Greenbrier Resort are being offered to residents of both Virginia states at \$59 per night through early February. Jim Justice, the resort’s owner said the special rate is one-fifth of the typical \$275 rate for a one-night stay, but that the move is “not a sign of desperation.”

Statewide, Alabama hotels have lowered rates but have suffered less than the nationwide average in occupancy rates, said State Tourism Director Lee Sentell during the 2009 Alabama Governor’s Conference on Tourism. The percentage of occupied hotel rooms in the United States dropped 7.1 percent during the first six months of the year versus Alabama’s decrease of 6.6 percent, he said, quoting STR. Nationally, the aver-

age room rate for the first six months of the year was \$98.78, compared to Alabama’s average rate of \$72.19.

Second- & Third-Tier Destinations Grow

In mid-sized cities such as Chattanooga, Tenn., meetings industry officials said they are seeing growth. Tim Riddle, executive director of the convention center, recently told the *Chattanooga Times Free Press* that

September revenue figures rose sharply from previous months. Events held in September generated a gross revenue of nearly \$496,000—almost as much as the July and August revenues combined, he said,

adding that September’s total is a 30 percent increase from the \$380,000 generated in September 2008. And a number of conventions are scheduled for the coming months that could signal an end to the slow economic period, Riddle said.

Third-tier destinations like Americus, Ga., are also faring well. An October article in the *Americus Times-Recorder*, reported that tourists spent almost \$34 million in Sumter County during 2008, up 5.7 percent from 2007.

In October, Virginia Tourism Corporation (VTC) reported that small-sized destinations are seeing positive growth despite the economic crunch with tourism spending in the Petersburg area, for example, growing by more than a third over the past five years. VTC reported that, in particular, the area of Colonial Heights set the pace with a three-fourths increase in traveler spending. Statewide, domestic travelers spent \$19.2 billion in Virginia in 2008, which was up 38 percent from five years before.

Destination marketing officials are also more focused on promoting smaller-sized destinations to groups, as is the case in Texas. Julie Chase, chief marketing officer for the Texas Office of the Governor’s Economic Development and Tourism Division said, “The secret to a successful meeting is location. Texas offers some of the best choices for meetings and conventions in the United States. From large cities with first-class convention facilities to smaller towns with bed-and-breakfasts, historic country inns and guest ranches that cater to meetings, Texas offers a destination to meet the needs of every type of meeting and convention. If you want to make your dollars go farther, you can’t go wrong with the Lone Star State.” ■

The national average room rate for the first half of 2009 was \$98.78.

—Smith Travel Research

The Long-Term Outlook Still Bright, World Travel Experts Report

This year has seen the worst recession since the 1930s, with global GDP contracting by an estimated 1.3 percent, said Jean-Claude Baumgarten, president/CEO of the World Travel and Tourism Council (WTTC).

While there are tentative signs that the economic cycle is now turning, driven by unprecedented policy stimuli, reviving credit markets and recovering asset prices, recovery is expected to be gradual—and a second dip into recession

early next year cannot yet be ruled out.

“As a result, travel and tourism economy GDP is now forecast to decline by 5.5 percent in 2009,” Baumgarten said, after announcing WTTC’s latest forecasts at the 2009 World Travel Market. Baumgarten was joined by Adrian Cooper, managing director of Oxford Economics, WTTC’s research partner.

“This means that travel and tourism’s contribution to global GDP will fall this year to less

than 9.3 percent from 9.6 percent in 2008,”

Baumgarten noted, “and this is also down from the 9.4 percent predicted at the start of 2009.

“Moreover,” he added, “activity in 2010 is likely to be flat at best.”

Nevertheless, the updated forecasts from WTTC and Oxford Economics show that there has been no change in the projected long-term trend growth of 4 percent per annum forecast for travel and tourism over the coming ►



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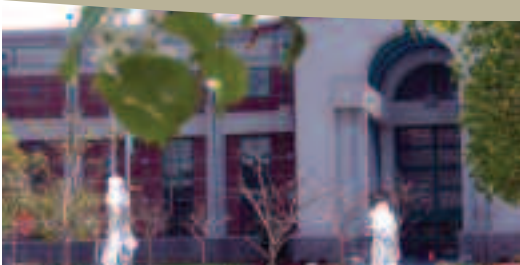
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decade, making it a key engine of expansion in the longer term.

“In the aftermath of the financial crisis that started last summer, the global economy contracted at its steepest rate in post-war history,” Cooper said. “However, recent indicators suggest that the global economy has passed its trough, and some forecasts for 2010 are now being upwardly revised.

“Key recovery drivers are unprecedented monetary and fiscal stimuli, reviving credit markets and recovering asset prices,” Cooper explained.

“But there are good reasons for caution and a second dip into recession early in 2010—what we call the double-dip scenario—cannot yet be ruled out,” Cooper said.

Travel and tourism economy GDP growth in 2008 slowed to 1 percent, WTTC announced, as significant momentum was lost in the second half of the year, and the deterioration intensified early in 2009, resulting in:

- International air passenger traffic contracting by 6 percent year on year in the first eight months of 2009;

- Monthly data for 68 countries covering 80 percent of global tourist trips showing overnight visitor arrivals on a similar path (January to September growth is estimated at 6 percent year on year); and

- Widespread losses across all regions, although currency effects and domestic tourism have provided some support.

Nevertheless, there are tentative recovery signs for travel and tourism with the most recent data indicating that the worst has passed. Given the deeper-than-expected global recession and tourism indicators for the year so far, the contraction in travel and tourism activity is now expected to be larger than anticipated in January.

Corporate travel cuts, household curtailment of leisure travel (especially international trips) and the postponement of investment plans for tourism infrastructure have all

been as bad as expected.

“Travel and tourism clearly continues to face challenging times,” Baumgarten said, “especially if the tentative recovery under way loses momentum or if the H1N1 influenza pandemic

were to intensify and become more virulent.

In the face of such difficult circumstances, travel and tourism requires the global policy environment to be supportive, Baumgarten stressed, adding that policy-makers therefore need to be wary about placing extra burdens on this previously dynamic

sector at this crucial time when profitability is already under severe pressure.

“If the challenging times facing travel and tourism are ignored by governments,” he said, “then its role in employment creation and poverty reduction could be seriously undermined.” ■

“...Recent indicators suggest that the global economy has passed its trough, and some forecasts for 2010 are now being upwardly revised.

—Adrian Cooper,
Oxford Economics

More Good News!

Travel Growth To Add 90,000 American Jobs In 2010

The U.S. Travel Association announced that projected modest 2010 increases in leisure, business and international inbound travel would enable the industry to add nearly 90,000 American jobs. Leisure travel is expected to rise 2 percent, business travel is projected to increase by 2.5 percent, business travel spending will increase 4 percent, and international inbound travel will increase by nearly 3 percent. These job gains come on the heels of 400,000 combined travel industry job losses in 2008 and 2009.

“The travel industry shares President Obama’s goal of putting Americans back to work,” said Roger Dow, president/CEO of the U.S. Travel Association. “Our industry is uniquely capable

of adapting to economic upswings and quickly adding tens of thousands of jobs.”

The travel industry employs 7.7 million Americans, supporting out of every eight non-farm jobs in the United States.

“Projected growth in leisure travel is an indicator of rising consumer confidence and disposable income,” said Dr. Suzanne Cook, senior vice president of research for the U.S. Travel Association. “Following a difficult 2009, businesses have a heightened focus on the value and bottom-line benefits of travel. We expect to see a slight increase in business travel next year based in part on pent-up demand for face-to-face meetings that drive growth and productivity.” ■

The South Appeals

According to ConventionSouth's Meeting Trends In The South Report, issued in September 2009,

Florida, Georgia & Texas

rank as the top three states in the South where respondents are holding meetings.

We asked respondents to tell us what region of the U.S. do they most frequently book their meetings?

48% - Southeast

18% - Midwest

17% - West

9% - Northeast

8% - Mid-Atlantic

According to the U.S. Travel Association, 5 out of the top 10 most visited to states in the United States are in the South.

#2 Florida

#3 Texas

#7 Georgia

#8 North Carolina

#9 Virginia

Southern States Report Strong Travel Spend

Despite the drop in U.S. hotel occupancy and overall economic recession, many Southern states like **Oklahoma** are reporting a strong economic impact from tourism. The Oklahoma Tourism and Recreation Department (OTRD) reported that tourism had a \$6.1 billion economic impact in 2008. This study marks the first time that direct domestic travel spending has reached more than \$6 billion in Oklahoma—an increase of 6.5 percent, said Hardy Watkins, OTRD executive director.



In **North Carolina**, Gov. Bev Perdue recently announced that 62 of the state's 100 counties saw increases in visitor spending in 2008, including 16 counties with increases of more than 5 percent.



Data from the N.C. Department of Commerce's Division of Tourism, Film and Sports Development showed domestic visitors to and within North Carolina spent a record \$16.9 billion in 2008, an increase of 2.1 percent from 2007. "We know that current economic conditions are affecting businesses all across the state, including those in the tourism industry," Gov. Perdue said. "But this continued economic growth, and especially growth in tax revenues, is encouraging."

In **Tennessee**, Gov. Phil Bredesen addressed an audience of tourism professionals in September during the 2009 Tennessee Governor's Conference on Tourism in Murfreesboro, Tenn. "Getting to the Heart of the Matter: Tourism Strategies for Tough Times" was the conference theme. Bredesen commended the industry on continued growth, even during challenging economic times. Tourism brought \$14.4 billion in direct economic impact to the state, Bredesen said. "Each year of my administration we have been able to report an increase in tourism's economic impact to Tennessee. Given the challenges our nation is facing in the current economic climate, I am particularly pleased this year is no different. These numbers attest to the quality of Tennessee's tourism offerings and reflect the continued success of the efforts of those who work in our tourism industry."



In **Louisiana**, Lt. Governor Mitch Landrieu met this year with New Orleans tourism leaders to discuss challenges facing the industry during the current economic downturn. "We had a banner year in 2008 and expect a strong year in 2009, but we need to start planning today for what is likely to occur down the road in 2010 and 2011," Landrieu said, adding that tourism is one of the main drivers of the state's economic growth. There is no industry that generates a better return on investment than the tourism industry does. If you want to grow the economy, this is one area where spending more makes sense." ■ **M.B.**





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