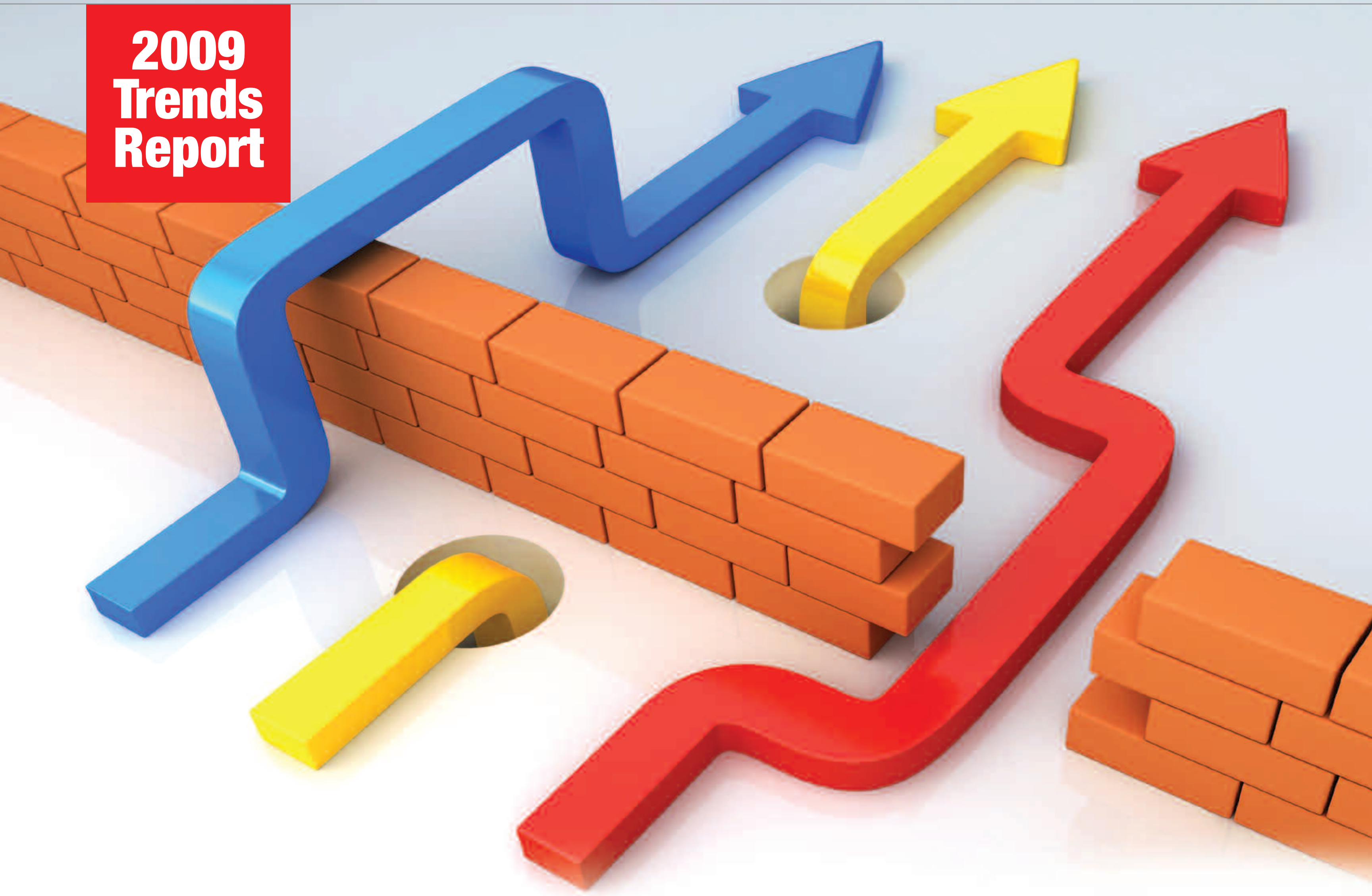


Economic Maneuvers

Planners React To Tough Times By Tightening Up & Planning Smarter

By Marlane Bundock

By the time many of you read this, a new president will be preparing to lead the country. And whether it's Sen. Barack Obama or Sen. John McCain, you can almost certainly be assured that the incoming president will be discussing the economy and, more importantly, his plan for reviving it. No matter your political views, you and other meeting professionals are likely paying close attention, especially as the current state of the global financial system—which took a downward turn in October—along with the rising cost of travel and other meeting-related costs are on the minds of everyone in the industry.

A palpable apprehension of the economic impact of the upcoming year was measured in the 2009 Meeting Trends In The South Report. Produced by *ConventionSouth* and the lodging industry specialists at PKF Hospitality, the report surveyed a broad sampling of meeting professionals from across the country—all of whom plan events in the South—on more than 100 questions related to their events in 2008, and their outlook for 2009.

In October, the survey results were tabulated and analyzed by *ConventionSouth*'s editorial staff and advisory board members, including PKF Hospitality's Robert Mandelbaum.

"What a difference a year makes," Mandelbaum said. "The outlook for meetings is much more pessimistic this year, versus last."

Mandelbaum, pointing to statistics revealed in this year's report, highlighted the following as standout results from 2007 to 2008:

- Expectations for the number of events, attendance and expenditures in 2008 are lower than previous years. And all measures are expected to decline in 2009 (see the Volume Expectations graph, right);
- The outlook for exhibitions is more positive than meetings in 2009;
- Increases in hotel, gas and airline prices/ flight availability are the main reasons for a projected decline in attendance (see the Airline Crisis graph, bottom right); and
- Overall, respondents said they believe while the health of the meetings industry has deteriorated throughout 2008 and it would stabilize in 2009.

Economic Challenges

Cindy Earl, senior administrative assistant for Presbyterian Church USA, said her events are already taking a hit from the "daily economic changes, increased charges by hotels and very shaky airline industry." She explained, "I usually have two meetings in the spring, one in Atlanta and one in Chicago. We are now consolidating these into one and cutting back on how many attend."

Ned Campbell, senior director of professional development for the Florida Institute of Certified Public Accounts, said his role as an association meeting planner is becoming "more difficult" due to the challenge of "finding quality space at a reasonable cost for participants. With airfare, gas and other costs going up, the overall cost for attending one of our events is also increasing," he said.

Fear Of The Unknown

The economy makes people afraid, said *ConventionSouth* Editorial Advisory Board Member Sue Walton, an independent planner for May and Williams Ltd., and a survey respondent. "Frankly, I'm scared because my major meetings do not occur until the middle of next year; I can get out of them, but then I don't know what my alternatives should be."

Laura Kuechenberg, regional director of sales for the event services firm ConferenceDirect, said it's hard not to be fearful. "The media has portrayed the economy as on the brink of disaster, thus making everyone nervous about the future." At the same time, Kuechenberg said the economy is driving a need for more organizations to meet.

In spite of the economic challenges, 52 percent of respondents said they expect the meetings industry to hold steady in 2009, while 18 percent said they expect the meetings industry to grow stronger in 2009. Interestingly, 83 percent of respondents reported that the number of meetings they planned in 2008 increased or stayed the same from the number they planned in 2007. And, more than 70 percent said the attendance rates at their meetings in 2008 were as they projected or turned out to be more than they expected.

Some planners are relying on their knowledge of past experiences; 70 percent of the respondents have more than 10 years of experience in the industry. As one anonymous respondent pointed out, similar fears gripped planners years ago when webinar and videoconferencing technology hit the market. "Everyone thought that exhibits and face-to-face meetings would be history, but this didn't happen because humans still need networking opportunities. The key will be to change with change."

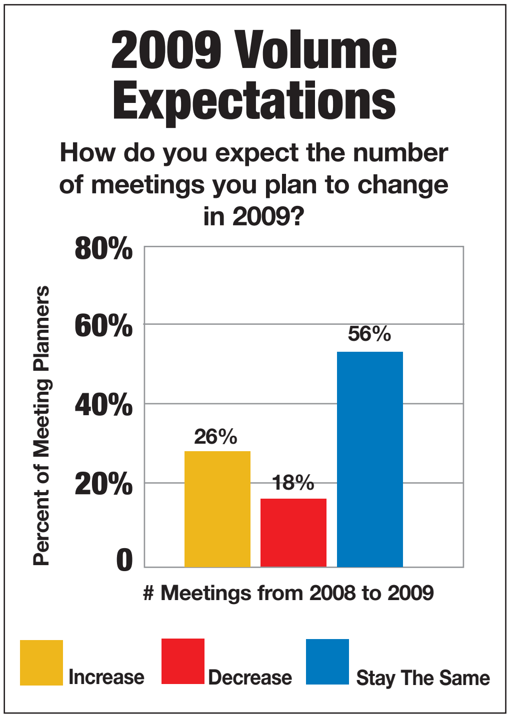
Planners' Advantage

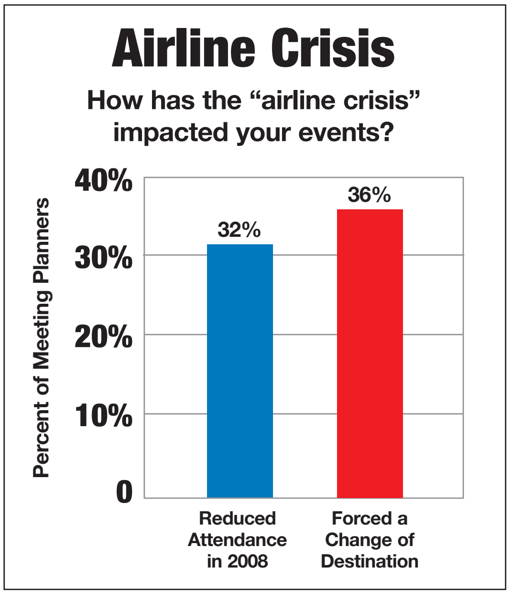
Record high hotel costs seen in 2007 and 2008 have added to planners' concerns, but many lodging industry experts are predicting a decline in hotel rates in coming months. Negotiating leverage is beginning to shift back to the planner, Mandelbaum said. "The pendulum of negotiating leverage with hotels appears to be swinging toward the meeting planner," he said, adding that there has also been a boom in new lodging construction in recent years, increasing competition among hotels.

Mandelbaum also noted that "unlike last year, meeting planners are looking to save money by cutting room costs." In fact, cutting costs by reducing rooms rates has moved up in importance for respondents from fifth in 2007 to third in 2008 (see the Top Cost-Cutting Areas graph on page 3). In addition, the price of hotel rooms is now the second most important criteria when selecting a site. Last year, it was fifth (see the Top Site Selection Criteria graph on page 4).

Budget Management

No matter the price tags or budgets planners are facing, they are strategically working to keep their costs in check. The trends report shows that 65 percent of planners noted that their meeting expenditures either decreased or stayed the same from 2007 to 2008. In 2009, 22 percent of respondents said they expect





their expenditure per meeting to decrease, while 42 percent expect it to remain the same (see the Costs Expected To Stabilize graph, bottom left).

Planners' desire to keep costs in check has affected brand loyalty for some who say they are now booking hotels based on their flexibility in negotiating costs and the convenience of their location rather than brand loyalty or luxury offerings (see the Brand Disloyalty graph, bottom).

Additionally, there is a growing consideration among planners of second- and third-tier destinations in lieu of first-tier destinations as a way to cut costs. Thirty-eight percent of respondents said they are willing to convene in smaller locales (see the Second- or Third-Tier Cities graph, bottom right). "There are more pressures on planners to save money; therefore, they are looking at second- and third-tier cities more than they have in the past," Walton said.

Planners also said they're meeting closer to home, with nearly one out of four saying they're selecting sites that are more regional in nature.

"In an attempt to contain costs, more of our meetings are being held where the greater number of executives reside. Plus, more of our execs expect to drive to and from meetings," said one corporate planner participating in the survey.

Nearly 50 percent of respondents said higher fuel prices have caused them to rethink their destination selections. In addition, from 2007 to 2008, 30 percent more respondents said fuel costs are negatively impacting their attendance—in spite of the fact that fuel prices have been dropping from record high prices recorded this summer.

Likewise, 50 percent of respondents said rising air travel costs are also resulting in meetings closer to headquarters, while 30 percent said hassles like reduced capacity are affecting their site selection decisions (see the Airline Crisis graph on page 2).

With the numerous challenges they are facing, planners are looking for help from destination marketing organizations and convention and visitors bureaus (CVBs) to make their jobs somewhat easier. In fact, 83 percent of respondents said they use CVBs in some capacity. Initial destination research and familiarization tours are the top two ways respondents said they are using CVBs. In addition, 87 percent of planners said they had a good or even great working relationship with CVB staff.

Building stronger relationships with suppliers was cited as very important in making meetings successful. Sixty-six percent of respondents said they have strong partnerships with meeting venue and hotel staff, while 30 percent said they have good relationships with them.

Helping to create stronger planner/supplier relationships are improved service standards. Twenty-four percent of planners reported that the service they experienced in 2008 was better than it was in 2007, while 68 percent said it stayed the same. One planner attributed this improvement in service standards to the economy. "As the economy has worsened,

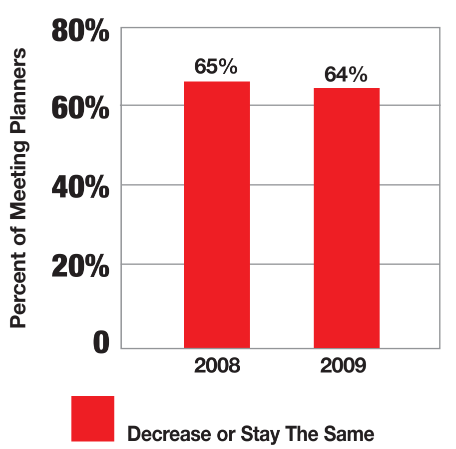
Top 8 Cost-Cutting Areas Of Events

Planners said they were more likely to cut costs in the following areas of their events:

1. Food & Beverage
2. Off-Site Events or Parties
3. Guest Rooms/Housing
4. Audio/Visual
5. Meeting Rooms
6. Length of Meeting
7. Transportation
8. Programming

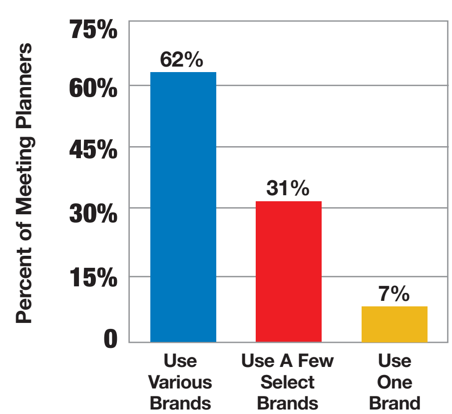
Costs Expected To Stabilize

How did your expenditures change in 2008 and how do you expect them to change in 2009?



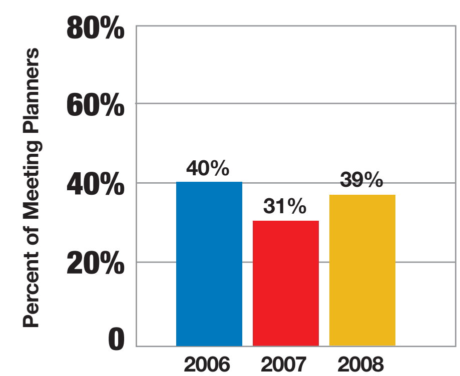
Brand Disloyalty

Planners said they are more likely to choose a hotel that meets their budget and other requirements rather than stay loyal to a brand.



Second- & Third-Tier Cities

During 2006, 2007 & 2008, did you consider second- or third-tier cities in lieu of first-tier cities as a way to cut costs?



venue staff have realized that [improved service standards] is the way to keep customers," the respondent commented.

In addition to better service, planners said they appreciate meeting sites that offer their attendees greater convenience, with on-site restaurants, complimentary parking and airport shuttle service ranking at the top of the list.

Time To Show The Value Of Your Meetings

Greater negotiating leverage, cost savings on room nights and food and beverage, and meeting sites that offer greater value for the dollar spent are just some of what planners are looking for in 2008 and 2009 (see the Top Cost-Cutting Areas grid on page 3).

Proving the worth of meetings is growing increasingly important, with 26 percent reporting that it is more critical than it was last year.

Likewise, 31 percent of planners said that the meetings aspect of their organization played a more important role in the success of their company in 2008 than it did last year.

Walton is one of numerous survey participants who advised that now is the time to really focus on the value meetings provide to attendees. "I need to be more selective and negotiate harder and better with venues," Walton said. "I also need to educate my clients better [about the value of my meetings]."

ConventionSouth Editorial Advisor Kelly Watkins, president of Expressive Concepts and a communications consultant, did not find this surprising when reviewing the results of the trends report. "When the economy is tight, people look for extra value. They want to maximize the return on their investment of money and time. So, look for ways to provide added worth."

Julianne Talley, conference director for the Florida Credit Union League, knows firsthand how the global financial crisis can have an impact on her meetings and events. "We definitely have seen a tightening on budget throughout our industry; specifically, off-site meetings have been affected. Primarily what I see is less travel due to rising gas prices and the concern of spending money on trips that may not be necessary. As a meeting planner, of course, I have always had the mindset that trips shouldn't be taken unless they are valuable. So, it is up to me and my team to prepare, so our members will not be wasting their time. Of course, networking has a value that is hard to measure, but many members walk away from networking with more information than they ever expected to receive."

Talley said she looks for ways to negotiate leaner contracts and spend less on food and beverage while still providing attendees a good meal. "My goal in my career is to give over-the-top, Five-Star service. That doesn't mean I need to spend a lot of money. What it does mean is that I give full attention, smiles, service and genuine care to my attendees. They come first, no matter what.

"Yes, the economy is challenging right now, but we have control over our attitudes and our actions," she said. "Pulling together, looking at new and innovative ways to save money, and communicating well with each other is key in this environment." ■

Discuss The Trends

Robert Mandelbaum of PKF Hospitality Research along with Independent Meeting Pro Sue Walton of May and Williams Ltd., will moderate our online planner forum at ConventionSouth.com during November.

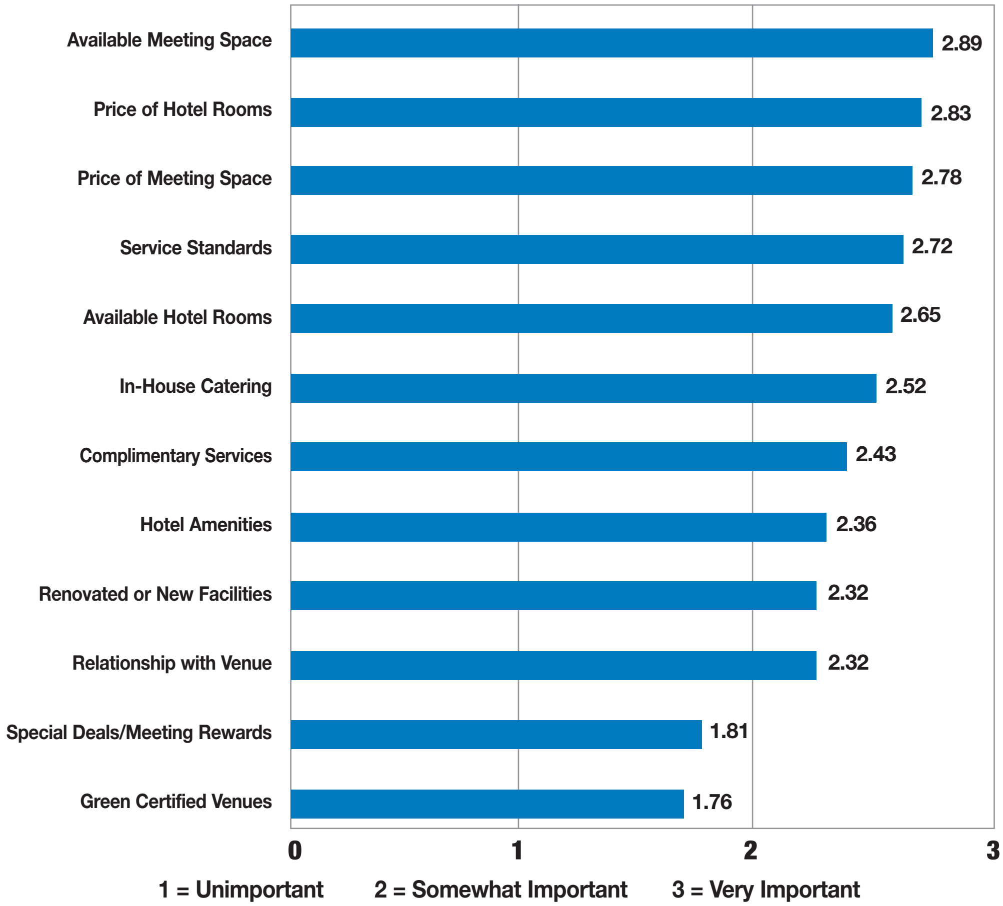
Log on to the forum to share your thoughts, questions and concerns about the future health of the industry and other issues that are on your mind. In response, they'll share their feedback and insight with you and others. ■

Mandelbaum

Walton

Top Site Selection Criteria

How important are the following items when selecting a meeting site?



ConventionSouth's

2009
Meeting Trends In The South Survey

In partnership with PKF Hospitality Research

Published: 10/5/2008

For more information, contact
Marlane Bundock
Managing Editor
ConventionSouth
251.968.5300
info@conventionsouth.com • www.conventionsouth.com

Survey Overview

Respondent Metrics

Respondents: 129

First Response: 7/25/2008 04:45 PM

Last Response: 8/25/2008 09:51 AM

Survey Results

The following is a tabular depiction of the responses to each survey question. Additional comments provided by respondents, if any, are included after each table.

Section - Profile

1. Which best describes your role as a meeting planner?

34.1%	43	Association
23.8%	30	Corporate
15.9%	20	Other:
13.5%	17	Government/Nonprofit
12.7%	16	Independent

2. How many years of experience do you have in the industry?

38.0%	49	11 - 20 years
22.5%	29	21 - 30 years
22.5%	29	6 - 10 years
9.3%	12	31 - 40 years
7.8%	10	0 - 5 years

3. Do you have any certifications or designations?

54.5%	24	CMP
31.8%	14	Other:
6.8%	3	CAE
6.8%	3	CMM

4. Which sources do you most frequently rely upon for industry information/continuing education?

25.9%	104	Industry publications/magazines
20.2%	81	Networking with colleagues
17.2%	69	Conventions/trade shows/seminars
15.7%	63	Industry associations/affiliated organizations
11.0%	44	Online publications
9.0%	36	Online seminars/webinars
1.0%	4	Other:

Section - Number of Meetings / Exhibitions / Events

5. From 2007 to 2008, the number of meetings I plan / my organization plans has:

56.6%	73	Stayed the same
26.4%	34	Increased
17.1%	22	Decreased

6. Why?

Responses omitted to protect the privacy of the survey participants.

7. Please estimate the number of meetings you are responsible for in 2008.

Responses omitted to protect the privacy of the survey participants.

8. Please estimate the total number of hotel room nights booked by attendees and exhibitors at your meetings in 2008.

Responses omitted to protect the privacy of the survey participants.

9. In 2009, I expect the number of meetings I plan / my organization plans to:

55.8%	72	Stay the same
25.6%	33	Increase
18.6%	24	Decrease

11. From 2007 to 2008, the number of exhibitions / trade shows I plan / my organization plans has:

77.9%	95	Stayed the same
11.5%	14	Decreased
10.7%	13	Increased

12. Why?

Responses omitted to protect the privacy of the survey participants.

13. Please estimate the number of trade shows / exhibitions you are responsible for in 2008:

None (Christian Methodist Episcopal Church, Juanita Bryant)

14. In 2009, I expect the number of exhibitions / trade shows I plan/my company plans to:

78.8%	89	Stay the same
11.5%	13	Decrease
9.7%	11	Increase

15. Why?

Responses omitted to protect the privacy of the survey participants.

Section - Attendance

16. What is the average attendance at your meetings?

46.1%	59	101-499
25.0%	32	More than 500
18.0%	23	51-100
8.6%	11	26-50
2.3%	3	Less than 25

Section - Attendance I

Instructions Provided To Respondents

For the following time periods, attendance at my meetings was:

17. In 2007:

64.3%	81	As I expected
26.2%	33	More than I expected
9.5%	12	Less than I expected

18. In 2008:

49.6%	63	As I expected
30.7%	39	Less than I expected
19.7%	25	More than I expected

Section - Attendance II

19. If attendance was more or less than you expected in 2008, please explain why.

Responses omitted to protect the privacy of the survey participants.

20. In 2009 I expect attendance at my meetings to be:

55.9%	71	About the same as 2008
27.6%	35	Greater than 2008
16.5%	21	Less than 2008

21. Where do your attendees typically originate from?

30.9%	69	National
23.3%	52	Statewide
17.5%	39	Regional area
14.8%	33	Local area
13.5%	30	Worldwide

22. When attending your meetings, how do your attendees typically travel?

38.9%	49	Most drive
38.9%	49	Most fly
22.2%	28	A good mix of fly-in attendees and drive-in attendees

23. If there has been a change in attendees' typical travel methods, please explain why.

Section - Meeting Budgets / Expenditures

24. What is your average per meeting expenditure for 2008?

24.4%	30	Below $25,000
22.8%	28	$26,000 to $50,000
22.0%	27	More than $200,000
11.4%	14	$51,000 to $75,000
10.6%	13	$76,000 to $100,000
8.9%	11	$101,000 to $200,000

25. From 2007 to 2008, our expenditure per meeting has:

47.2%	60	Stayed the same
35.4%	45	Increased
17.3%	22	Decreased

26. In the next 18 months, I expect our expenditures per meeting to:

41.6%	52	Stay the same
36.0%	45	Increase
22.4%	28	Decrease

27. Why?

Responses omitted to protect the privacy of the survey participants.

28. In 2008/2009, I am being asked to cut costs in the following areas of my budget:

20.2%	66	Food & Beverage
14.7%	48	Off-site events or parties
11.3%	37	Guest rooms/housing
9.8%	32	Audio/Visual
9.8%	32	None
8.3%	27	Meeting rooms
7.3%	24	Length of meeting
6.7%	22	Transportation
5.2%	17	Programming
4.9%	16	Incentives/Rewards/VIP Services
1.8%	6	Other:

29. Who is responsible for managing the meetings budget?

57.7%	71	Meetings department
38.2%	47	Other:
4.1%	5	Procurement department

Section - Meeting Locale - Region

30. In 2008, compared to 2007, my meetings and events have been:

78.4%	98	About the same in location selection
18.4%	23	More regional in nature
3.2%	4	Less regional in nature

31. Why?

Responses omitted to protect the privacy of the survey participants.

32. How far from your office are you typically holding/willing to hold meetings?

36.2%	46	National
27.6%	35	No Limit
15.7%	20	Regional
15.7%	20	State
4.7%	6	Local

Section - Meeting Locale - Destination

33. Most of the meetings I plan are held within

45.9%	56	First-tier destinations
45.1%	55	Second-tier destinations
9.0%	11	Third-tier destinations

34. In 2008 or for 2009, compared to 2007, have you been asked to consider second- or third-tier destinations in lieu of first-tier destinations for cost savings or other reasons?

61.8%	76	No
38.2%	47	Yes

35. In what region of the U.S. do you most frequently book your meetings?

36.1%	101	Southeast
18.9%	53	West
16.8%	47	Mid-West
14.3%	40	Northeast
13.9%	39	Mid-Atlantic

36. In what areas of the South do you most often book your meetings?

28.8%	79	Florida
18.6%	51	Texas
14.6%	40	Georgia/Alabama
14.2%	39	The Virginias/The Carolinas
7.7%	21	Mississippi/Louisiana
6.9%	19	Tennessee/Kentucky
6.2%	17	All over the Southeast
2.9%	8	Oklahoma/Arkansas

Section - Site Selection Criteria

37. How much meeting space do you require for your largest meeting?

49.6%	63	More than 10,000 square feet
23.6%	30	5,000 to 10,000 square feet
18.1%	23	2,000 to 5,000 square feet
8.7%	11	Less than 2,000 square feet

38. What types of facilities do you use most frequently for your meetings/events?

76.6%	98	Hotels
13.3%	17	Convention centers
6.3%	8	Conference centers
3.9%	5	Non-traditional meeting venues

39. When using a hotel for a meeting/event, what types do you use most often?

16.6%	69	Urban/Downtown Hotel
13.5%	56	Coastal Resort
12.0%	50	Conference Center Hotel
11.1%	46	Convention Center Hotel
8.9%	37	Airport Area Hotel
8.9%	37	Suburban Hotel
7.2%	30	Historic Hotel
7.2%	30	Non-Coastal Resort
5.1%	21	Boutique Hotel
4.6%	19	Casino Hotel
3.4%	14	Lodge/Rural Hotel
1.4%	6	Limited Service Hotel

40. Why?
Responses omitted to protect the privacy of the survey participants.

41. Do you typically book particular hotel brands for your events?

62.3%	76	Typically use various hotel brands
31.1%	38	Typically use a few, select hotel brands
6.6%	8	Typically use one particular hotel brand

42. Which hotel brand do you book the most?
Responses omitted to protect the privacy of the survey participants.

43. Why?
Responses omitted to protect the privacy of the survey participants.

Section - Site Selection Criteria II

Instructions Provided To Respondents
Please rate the importance of the following criteria when selecting a meeting site:

44. Number of available hotel rooms

70.2%	87	Very important
25.0%	31	Somewhat important
4.8%	6	Unimportant

45. Hotel amenities

50.8%	63	Somewhat important
42.7%	53	Very important
6.5%	8	Unimportant

46. Available meeting space

90.4%	113	Very important
8.0%	10	Somewhat important
1.6%	2	Unimportant

47. Price of hotel rooms

84.8%	106	Very important
13.6%	17	Somewhat important
1.6%	2	Unimportant

48. Price of meeting space

83.1%	103	Very important
12.1%	15	Somewhat important
4.8%	6	Unimportant

49. Complimentary services

48.4%	60	Very important
46.0%	57	Somewhat important
5.6%	7	Unimportant

50. Overall affordability

89.6%	112	Very important
10.4%	13	Somewhat important

51. Meeting Venue Technology

54.8%	68	Somewhat important
30.6%	38	Very important
14.5%	18	Unimportant

52. Guest Room Technology

59.7%	74	Somewhat important
22.6%	28	Very important
17.7%	22	Unimportant

53. Air access

52.8%	65	Very important
34.1%	42	Somewhat important
13.0%	16	Unimportant

54. Drive access

47.6%	59	Very important
41.1%	51	Somewhat important
11.3%	14	Unimportant

55. Destination / Nearby amenities and attractions

56.9%	70	Somewhat important
29.3%	36	Very important
13.8%	17	Unimportant

56. Taxes

55.0%	66	Somewhat important
28.3%	34	Unimportant
16.7%	20	Very important

57. Relationship with Venue Representative

44.6%	54	Very important
43.0%	52	Somewhat important
12.4%	15	Unimportant

58. Relationship with CVB

46.7%	57	Somewhat important
32.8%	40	Unimportant
20.5%	25	Very important

59. Service Standards

73.0%	89	Very important
26.2%	32	Somewhat important
0.8%	1	Unimportant

60. Environmentally Certified (Green) Venues

59.8%	73	Somewhat important
32.0%	39	Unimportant
8.2%	10	Very important

61. Familiarization Tours/Site Visits Offered

41.8%	51	Somewhat important
40.2%	49	Unimportant
18.0%	22	Very important

62. Renovated or New Facilities

48.4%	59	Somewhat important
41.8%	51	Very important
9.8%	12	Unimportant

63. Hot Dates/Special Deals/Meeting Rewards Offered

39.8%	49	Unimportant
39.0%	48	Somewhat important
21.1%	26	Very important

64. AAA or Other Ratings/Honors/Awards

51.6%	63	Somewhat important
35.2%	43	Unimportant
13.1%	16	Very important

65. In-House Catering

62.1%	77	Very important
28.2%	35	Somewhat important
9.7%	12	Unimportant

66. On-Site Security

46.7%	57	Somewhat important
41.8%	51	Very important
11.5%	14	Unimportant

67. Complimentary or Low Cost Parking

49.6%	62	Very important
40.0%	50	Somewhat important
10.4%	13	Unimportant

68. Airport Shuttle

49.6%	61	Somewhat important
30.9%	38	Very important
19.5%	24	Unimportant

69. Other

41.7%	15	Unimportant
30.6%	11	Very important
27.8%	10	Somewhat important

Section - Site Selection Criteria III

70. Specify Other:

Responses omitted to protect the privacy of the survey participants.

71. Do attrition clauses affect your site selection decisions?

56.2%	68	Yes
43.8%	53	No

72. If yes, how?

Responses omitted to protect the privacy of the survey participants.

Section - Destination Assistance / Service

73. How do you use Convention & Visitors Bureaus?

26.3%	73	Initial destination research
21.2%	59	Site visits
16.9%	47	Materials to promote meeting
11.5%	32	Tour planning/arrangements
7.9%	22	Don't use
7.9%	22	Registration assistance
6.8%	19	Housing Bureau
1.4%	4	Other:

74. How do you describe your relationship with CVB staff?

46.5%	53	Good working relationship
39.5%	45	Great working relationship
14.0%	16	Weak working relationship

75. How do you describe your relationship with Meeting Site staff?

65.5%	78	Great working relationship
30.3%	36	Good working relationship
4.2%	5	Weak working relationship

76. Have you ever utilized the services of a third-party provider such as a destination management company (DMC) or a site selection firm?

52.9%	46	DMC
31.0%	27	Site selection firm
9.2%	8	Other:
6.9%	6	Association Management Company

77. Relative to 2007, please rate the overall level of service you are receiving from your meeting sites in 2008:

67.5%	79	Same
23.9%	28	Better
8.5%	10	Worse

78. Why?

Responses omitted to protect the privacy of the survey participants.

Section - Amenities

79. In 2008, what is your level of satisfaction with the technological capabilities offered by meeting sites?

67.2%	84	Satisfied
28.8%	36	Very satisfied
4.0%	5	Unsatisfied

Section - Amenities I

Instructions Provided To Respondents

How important to site selection is the availability of the following technological components in the meeting room?

80. High-speed Internet connectivity

67.5%	83	Very important
27.6%	34	Somewhat important
4.9%	6	Unimportant

81. WiFi

47.9%	58	Very important
41.3%	50	Somewhat important
10.7%	13	Unimportant

82. Complimentary Internet access

68.9%	84	Very important
27.9%	34	Somewhat important
3.3%	4	Unimportant

83. A/V equipment

69.1%	85	Very important
17.9%	22	Somewhat important
13.0%	16	Unimportant

84. Videoconferencing

64.2%	79	Unimportant
26.0%	32	Somewhat important
9.8%	12	Very important

85. Downlink/Uplink capability

44.3%	54	Somewhat important
42.6%	52	Unimportant
13.1%	16	Very important

Section - Amenities II

Instructions Provided To Respondents

How important to site selection is the following in attendees' guest rooms?

86. In-room high-speed Internet access

65.0%	80	Very important
31.7%	39	Somewhat important
3.3%	4	Unimportant

87. WiFi

44.3%	54	Somewhat important
43.4%	53	Very important
12.3%	15	Unimportant

88. Complimentary Internet access

65.3%	79	Very important
29.8%	36	Somewhat important
5.0%	6	Unimportant

89. Entertainment options such as HDTV, Surround Sound Theater, TiVo, XM Radio, etc.

57.7%	71	Unimportant
36.6%	45	Somewhat important
5.7%	7	Very important

Section - Amenities V

Instructions Provided To Respondents

In the way of what your attendees want from a meeting venue/hotel, how important are the following amenities?

90. Full-service / 24-hour business center

51.6%	63	Somewhat important
39.3%	48	Very important
9.0%	11	Unimportant

91. Pool

41.3%	50	Somewhat important
33.1%	40	Very important
25.6%	31	Unimportant

92. Adult pool

45.9%	56	Somewhat important
44.3%	54	Unimportant
9.8%	12	Very important

93. Spa

52.5%	64	Somewhat important
30.3%	37	Unimportant
17.2%	21	Very important

94. On-Site Golf

47.1%	57	Unimportant
37.2%	45	Somewhat important
15.7%	19	Very important

95. Off-Site Golf

51.2%	62	Unimportant
36.4%	44	Somewhat important
12.4%	15	Very important

96. Golf Club / Golf Pro

60.8%	73	Unimportant
31.7%	38	Somewhat important
7.5%	9	Very important

97. Beach

54.9%	67	Unimportant
36.1%	44	Somewhat important
9.0%	11	Very important

98. Tennis

69.4%	84	Unimportant
24.8%	30	Somewhat important
5.8%	7	Very important

99. Fitness facility

47.5%	58	Somewhat important
45.1%	55	Very important
7.4%	9	Unimportant

100. Outdoor Recreation

47.5%	57	Somewhat important
37.5%	45	Unimportant
15.0%	18	Very important

101. Restaurants/Lounges

71.5%	88	Very important
26.0%	32	Somewhat important
2.4%	3	Unimportant

102. Free Parking

62.3%	76	Very important
30.3%	37	Somewhat important
7.4%	9	Unimportant

103. Airport Shuttle

43.4%	53	Somewhat important
43.4%	53	Very important
13.1%	16	Unimportant

104. Environmentally friendly services

55.7%	68	Somewhat important
23.0%	28	Unimportant
21.3%	26	Very important

105. Other

44.0%	11	Unimportant
28.0%	7	Somewhat important
28.0%	7	Very important

Section - Amenities VI

106. Specify Other:

Responses omitted to protect the privacy of the survey participants.

Section - Current Issues / Events

Instructions Provided To Respondents

Have higher hotel room prices affected:

107. Attendance at your events in 2007?

75.6%	90	No
24.4%	29	Yes

108. Attendance at your events in 2008?

54.2%	64	No
45.8%	54	Yes

109. Your meeting destination selection?

63.0%	75	Yes
37.0%	44	No

Section - Current Issues / Events I

Instructions Provided To Respondents

Have higher gas prices affected:

110. Attendance at your events in 2007?

83.1%	98	No
16.9%	20	Yes

111. Attendance at your events in 2008?

52.1%	62	Yes
47.9%	57	No

112. Your meeting destination selection?

53.3%	64	No
46.7%	56	Yes

Section - Current Issues / Events II

Instructions Provided To Respondents

Have higher airline prices affected:

113. Attendance at your events in 2007?

83.1%	98	No
16.9%	20	Yes

114. Attendance at your events in 2008?

50.8%	60	Yes
49.2%	58	No

115. Your meeting destination selection?

51.7%	61	No
48.3%	57	Yes

Section - Current Issues / Events III

Instructions Provided To Respondents

Have airline/airport travel slowdowns or general service standards negatively affected:

116. Attendance at your events in 2007?

85.5%	100	No
14.5%	17	Yes

117. Attendance at your events in 2008?

68.4%	80	No
31.6%	37	Yes

118. Your meeting destination selection?

64.3%	74	No
35.7%	41	Yes

Section - Current Issues / Events IV

119. In 2008, compared to 2007, how important are environmentally friendly meetings to your organization and your attendees?

58.0%	69	More important, but not critical
36.1%	43	Same as before, not critical
5.0%	6	More important, now critical
0.8%	1	Same as before, very critical

Section - Your Job / Industry Outlook

120. In 2008, compared to 2007, how important is it for you to show the return on investment (ROI) of your meetings?

33.6%	40	More important, but not critical
26.1%	31	More important, critical
21.0%	25	Same as before, critical
19.3%	23	Same as before, not critical

121. In 2008, compared to 2007, has the meetings aspect of your organization played an important role in the overall success of your company?

67.8%	82	Same as before
30.6%	37	More important
1.7%	2	Less important

122. How do you see your role as a meeting planner evolving over the next few years?

Responses omitted to protect the privacy of the survey participants.

123. How important to you / your organization is your continuing education and professional development?

52.9%	64	Very important
37.2%	45	Somewhat important
9.9%	12	Not important

124. Are you satisfied with your current income?

45.8%	55	Somewhat
32.5%	39	Yes
21.7%	26	No

125. Have you received a raise within the last 18 months?

75.0%	90	Yes
25.0%	30	No

126. Do you expect to receive a raise within the next 18 months?

73.3%	88	Yes
26.7%	32	No

127. Do you expect to make your desired income at your current position / organization?

55.0%	66	Yes
45.0%	54	No

128. In 2008, compared to 2007, has your workload:

63.9%	78	Increased
29.5%	36	Stayed the same
6.6%	8	Decreased

129. If you noted a change, to what do you attribute the change?

Responses omitted to protect the privacy of the survey participants.

130. Rate your current stress level:

39.3%	48	Average
38.5%	47	Somewhat high
14.8%	18	Very high
7.4%	9	Below average

131. What is the likelihood that you will continue to work in the meetings industry within the next 10 years?

68.6%	83	Likely
23.1%	28	Not sure
8.3%	10	Not likely

132. Compared to a year ago, do you think the overall health of the meetings industry has:

43.4%	53	Gotten worse
36.9%	45	Stayed the same
19.7%	24	Gotten better

133. Why?

Responses omitted to protect the privacy of the survey participants.

134. How do you feel about the future health of the meetings industry within the next 18 months?

51.6%	63	Expect it to stay about the same
30.3%	37	Expect it to get worse
18.0%	22	Expect it to get better

134. Why?

Responses omitted to protect the privacy of the survey participants.