

Metro Tourism and Convention Commission Meeting Minutes

September 11, 2025

Time: 8:30 am

Location: 500 11th Avenue North, Suite 650, Nashville TN

Leesa LeClaire called the meeting to order at 8:31a.m.

Commissioners Present

- Leesa LeClaire, Chair
- Mark Hayes, Vice Chair
- Sherry Franklin
- Dr. Sybil Brown
- Tom Petrillo
- Rob Higgins
- Derrick Free
- Nealy Glen
- Q-Juan Taylor

Metro Staff

Jamari Brown, Mayor's Office
Hannah Zeitlin, Legal Counsel
Metro IT Representatives

Nashville Convention & Visitors Corp (NCVC) Staff

Deana Ivey
Lissa Allen
Adrienne Siemers
Heather Middleton
Bruce McGregor
Brad Lineberry
Jeff Mefford
Ashley Warrington

Following roll call, Leesa LeClaire opened the public comment period. With no comments, the meeting moved to the agenda.

Mark Hayes motioned to approve the May 2025 minutes; Derrick Free seconded the motion; the motion passed unanimously.

LeClaire asked Jeff Mefford, Chief Financial Officer of the NCVC, to provide the financial report. He provided the following highlights.

- Total hotel tax collections for Metro for the FY 25 year-end are approximately \$152 million. The portion dedicated to tourism promotion for the year totaled \$44,080,000, which is within 1.5% of the prior year's total, which is above the amount required to fully fund the NCVC's budget.
- Many large markets have reported significant performance weakness this year as a result of multiple economic headwinds in the industry; Nashville as a destination has performed very well by comparison, most reflective in the city's consistent 93-98% occupancy rate.
- The financial summary shows the total amount charged to the Metro contract for the fiscal year which was \$35,610,094. The NCVC's contract with the city is a reimbursement arrangement, and the organization only receives funding necessary to cover actual expenses. With spending being lower than budget in many areas, it lowers the required contract reimbursement. The term "negative revenue variance" shown in the report is a function of this lower spending; it does not indicate a lack of available funding.
- Membership revenue has exceeded the conservative budget targets and surpassed the actual totals from FY 24.
- Total revenue was approximately \$46 million, including an additional \$10 million in revenue raised from other sources, which supplements Metro contract funding.
- Expense activities have tracked closely to the NCVC's marketing plan, and spending is under budget in most areas. All planned activities have yielded positive results.

Sherry Franklin motioned to approve the Financial Report; Dr. Sybil Brown seconded the motion; the motion passed unanimously.

LeClaire asked Bruce McGregor, Senior Vice President of Research with the NCVC, to provide a research update. He provided the following highlights.

- The State released the 2024 visitation economic impact report on Davidson County. The city attracted 16.94 million visitors; 66.7% were overnight visitors (11.29 million) and 33.3% were day visitors (5.64 million).
- Nashville spending by visitors increased by 4.2%, setting a new record at \$11.22 billion. This averages to visitors spending \$30.7 million per day in Nashville.
- Spending by category:
 - o 24% or \$2.7 billion – lodging
 - o 23% or 2.6 billion - food and beverage
 - o 23% or 2.6 billion - amusement and recreation
 - o 11% or 1.2 billion – retail
 - o 19% or \$2 billion - transportation
- Davidson County ranks as the number one in the state for visitor spending. Over one-third of total state visitor spending was in Davidson at approximately 35%.
- Tourism Economics predicts Davidson County to have 17.39 million visitors in 2025 and have continued growth through the next several years.

- Visitor spending is projected to exceed \$12 billion in 2026 and \$12.6 billion in 2027.
- Hotel demand increased by 0.9%; room revenues decreased by 1.1%; occupancy rates decreased by 1.9% due to the supply growth of almost 3%.
- Short-term rental demand increased 6.6% through August; rates decreased 1.4%.
- The Nashville airport is a key measure of the city's success, servicing 114 destinations with nonstop flights and 300+ daily departures. Nashville's airport has record passenger levels in its past fiscal year, with a 4.5% increase of 24.77 million. This is the fourth year in a row for passenger increase. June set a monthly record with 2.42 million passengers.
- The Nashville airport reports increased international volume in its Q2 25 report (April – June), with European passenger volume increasing by 28.6%. Europe is the airport's largest market, with a 30% share; Canada is the second largest market with 23%. Nashville's three international direct flights, British Airways, Aer Lingus and IcelandAir continue to perform well.

Discussion ensued on the following:

- The number of short-term rentals reported include only those with permits.
- There is discussion with multiple airlines interested in investing in international direct flights to Nashville.

LeClaire asked Deana Ivey, President & CEO of the NCVV, to give a report from the organization. She provided the following updates.

- The NCVV produced the city's July 4th event, which had record attendance at 365,000, direct visitor spending of \$23.8 million and sold 30,788 hotel rooms.
- The 2026 July 4th event will be part of the America's 250th celebration. There are plans to enhance the event further, including expanding the event to two days.
- CMA Fest had a record performance with \$86 million in direct visitor spending, 95,000 in attendance, and hotel demand up 6% from previous year.
- Major concerts continue to drive significant occupancy for the entire city; concert attendees drive occupancy downtown, which causes compression throughout the city. Recent concert performance:
 - o Metallica – May: hotel occupancy - 95%
 - o AC/DC – May: concert delayed one day for weather, driving occupancy higher: hotel occupancy citywide - 93%; hotel occupancy downtown - 98%
 - o Coldplay – July: record breaking ticket sales at 55,663 tickets; 81% of attendees were outside of Nashville; 16% local; 3% international; hotel occupancy citywide - 92%; hotel occupancy downtown - 98%
- *Travel + Leisure* named Nashville as the #13 Best Cities in the U.S.
- A YouGov survey ranked Nashville as #1 most favorable large city in America with broad appeal among generations, income levels, religions and political preferences.

- The NCVC partnered with the notable Stand Up To Cancer telecast, which showcased Nashville during the broadcast across 30 national platforms.
- ABC has made the new *9-1-1: Nashville* show a priority show for the fall season and invested over \$35 million in promotional advertising internationally.
- The prestigious Michelin Guide has expanded to the Southeast for the first time, including Nashville. Researchers are currently evaluating restaurants, and an announcements ceremony is scheduled for November 3 at Michelin's headquarters in Greenville South Carolina. Several Nashville restaurants are anticipated to be included, which will enhance the city's growing reputation as a creative culinary destination.

Discussion ensued on the following:

- The NCVC is applying for two federal America 250 grants totaling \$45,000 to enhance the event.

Adrienne Siemers, Chief Sales Officer for the NCVC, provided the following sales report.

- FY 25 was a record-breaking year for sales, generating approximately 2.3 million definite room nights between the tourism and convention sales teams.
- The strategy for FY 26 is to increase conversion rates, with continued emphasis on increasing sales in months and years in which the city currently has lower volume booked.
- To assist with this strategy, a new position has been added to focus on securing smaller meetings, (10–49 rooms on peak), to fill hotel availability around citywide convention bookings, especially in the shorter-term booking window. Equal efforts continue to attract major citywide conventions in the longer-term window, utilizing the new Titans stadium in 2027 as additional space for to accommodate larger meetings.
- The sales team has multiple sales missions and tradeshow targeted for the quarter, which produce great results:
 - o The American Society of Association Executives Annual Meeting - Los Angeles (August)- 149 key meeting planner connections representing over 104,000 total room nights
 - o IMEX America - Las Vegas (October) – currently 14 concurrent appointment tracks
 - o Chicago and Washington DC Sales Blitzes – (November) – approximately 300 clients; attending with multiple local parts to sell Nashville; planning receptions in both markets with CMA Award–winning songwriters Matt and Josh Jenkins to showcase Nashville and sell the city
 - o ASAE Summit Awards – Washington, DC – Award-winning Nashville artist Striking Matches will showcase Nashville and sell the city to key association clients

- Association Forum's Holiday Showcase – Chicago (December) – approximately 300 meetings industry professionals; CMA Award winner Charlie Worsham will showcase Nashville and sell the city.

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Heather Middleton, Chief Marketing Officer for the NCVC, provided the following Marketing report.

- The current advertising campaign's brand theme is "There's More Than One Way to Play Music City," and highlights a wide array of things to enjoy throughout the city.
- The advertising plan is created for the year but intentionally purchased in smaller increments to allow for flexibility and adjustments based on research insights and quick response to changing consumer sentiments and opportunities.
- The campaign includes a full-funnel marketing approach with emphasis on lower-funnel tactics, such as search, video, audio, content marketing, social media, and display advertising.
- The core audience targets remain Nashville loyalists; music lovers, concert-goers, frequent travelers, food enthusiasts, and individuals interested in sports, arts, and culture. Research demonstrates that Nashville is positioned as a premium destination for affluent travelers; some advertising is targeting high-income individuals who share the same interests as the core audience but have higher household incomes.
- Event-specific campaigns are planned for New Year's Eve, Dine Nashville, July 4th, and holiday travel; there is also additional focus on drive markets, families, and niche audiences such as foodies.
- Per research, the domestic focus remains on the previous year's core markets, with the addition of Charlotte across all campaigns and Minneapolis where budgets permit.
- International efforts continue a strong emphasis on the United Kingdom, Europe, and Canada, with flexibility to shift based on evolving market conditions.
- Advertising partnerships and co-ops continue with Expedia, TripAdvisor, StyleBlueprint, Sojern, and iHeart; specialized advertising support continues for Tourism and Convention Sales, including LinkedIn campaigns specifically targeting meeting planners.
- Last year the NCVC hosted 220 journalists in Nashville; this year, nine group press trips are currently planned.

A discussion ensued on the following:

- Commission members were impressed with the city's success considering the national uncertainty due to recent economic insecurity and tariffs.
- NCVC has heavily invested in research which is vitally important to monitor particularly during evolving and volatile travel climates; this research drives market decisions; the NCVC's plans intentionally remain flexible to be able to respond to changing market conditions.
- The two new direct international flights are performing well.

- The NCVC employs an agency that assist in recruiting and vetting quality journalists for press tours; the organization also employs an agency in London and satellite agencies in Europe that assist with international media and travel trade clients.
- Nashville has 14,000 luxury hotel rooms under development, each marketing to a higher household income.

Marie Sueing, Chief Engagement Office for the NCVC, provided the following report.

- Nashville is hosting the national Urban League Conference for the first time in 2026; the NCVC team joined local Urban League representatives for the 2025 conference in Cleveland to promote Nashville for next year's event.
- The National Bar Association will also host its annual convention in Nashville in 2026; the NCVC team joined NBA President Ashley Upkins during this summer's convention to promote the 2026 convention in Nashville.
- The Music City Chart Climbers inaugural cohort graduated. Applications for the 2026 class launched last week. The program connects small, minority-owned businesses interested in growing their companies through the hospitality industry. Amazon will remain a main sponsor of the program for 2026.

LeClaire announced this meeting as the first of Metro's new fiscal year. The first order of business is to conduct annual appointments.

LeClaire opened the nominations for chair; Franklin nominated LeClaire for Chair, who accepted the nomination.

Sherry Franklin motioned to approve LeClaire as Chair; Derrick Free seconded the motion; the motion passed unanimously.

LeClaire opened the nominations for Vice-Chair; LeClaire nominated Dr. Sybil Brown for Vice-Chair, who accepted the nomination.

Sherry Franklin motioned to approve Brown as Vice-Chair; Derrick Free seconded the motion; the motion passed unanimously.

LeClaire announced the next meeting on December 2, 2025.

LeClaire announced that 8th & Roast is the official coffee of the Tennessee Titans

Free announced that Gray Line of Tennessee received the IMG International Motor Coach Group Operator of the Year Award. Gray Line of Tennessee will have a soft launch for a new transportation service from the airport to Cool Springs in the next two weeks.

LeClaire stated that GNHA is connecting workforce development opportunities with Metro Public Schools culinary and hospitality programs. A field trip including MNPS high

school juniors and seniors in those programs was created, including tours of the CMA theater, the Tri-Brand hotel downtown and the Nashville Downtown Hilton. These types of programs are very successful to connect students with employment opportunities.

LeClaire called for any additional business; none was presented.

Q-Juan Taylor motioned to adjourn the meeting at 9:28a.m.; Free seconded; the motion passed unanimously.