

Metro Tourism and Convention Commission
Tuesday, December 2, 2025
Time: 8:30am
Location: 500 11th Avenue North, Suite 650, Nashville, TN

Leesa LeClaire called the meeting to order at 8:33 a.m.

Commissioners Present:

- Leesa LeClaire, Chair
- Mark Hayes, Vice Chair
- Sherry Franklin
- Dr. Sybil Brown
- Robert Higgins
- Derrick Free
- Q-Juan Taylor

Commissioners Not in Attendance:

- Nealy Glenn
- Tom Petrillo

Metro Staff:

- Courtney Mohan, Legal Counsel
- Metro IT Representatives

Nashville Convention and Visitor Corp (NCVC) Staff:

- Deana Ivey
- Jeff Mefford
- Bruce McGregor
- Heather Middleton
- Adrienne Siemers
- Marie Sueing
- Andrea Arnold
- Brad Lineberry
- Ashley Warrington
- Elgin Cato

Following roll call, Leesa LeClaire opened the public comment period. With no comments, the meeting moved to the rest of the agenda. LeClaire requested approval for the minutes of the September meeting.

Sherry Franklin motioned to approve the September 2025 minutes; Sybil Brown 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:

- Mefford reminded the Commission that no surplus or profit was provided to the NCVC through metro resources. The NCVC is only reimbursed for actual expenses incurred in the promotion of the city.
- Hotel Tax collections total received during the first quarter of the year was just over \$39 million. The portion of that dedicated to Tourism Promotion of \$11.3 million is within 1.3% of the prior year total and exceeds the NCVC's expense reimbursement requests for the year.
- Year to date total reimbursement requested by the NCVC from our metro contract for the period was \$9,200,625.
- Total revenue received for the period from all sources was \$13,233,544 including the additional revenue that the NCVC obtained from other sources.
- Costs are running in line with expectations and have closely followed the 2026 Marketing Plan.
- Total expenses incurred for tourism promotion activities during the 4 months were \$13,233,544.

Mark Hayes motioned to approve the Financial Report; Derrick Free seconded the motion; and 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:

- Future Partners research company conducted a monthly survey of American travelers on their destination preferences and spending power. Nashville's year to date 2025 scores were very good compared to top 40 US destinations.
 - o #1 for welcoming and friendly
 - o #1 for positive word of mouth and destination popularity
 - o #2 appeal as a place to visit
 - o #4 safety
 - o #5 as a meeting destination
 - o 92% are excited for upcoming leisure travel and 69% make travel a financial priority.
 - o Spontaneous leisure travel has an overall survey average of 19%, with recent Nashville travelers seeing over 30%.
- January through October 2025 for Nashville shows positive year-over-year hotel room demand, saw hotel demand increase approximately 2%, and room revenues were flat.

- Hotel rates for the year were down 1.6%. The number of rooms sold increased, but occupancy rate declined by 1.4% due to an increase in hotel room supply; supply has increased 3.4% this year.
- Eight months of 2025 yielded growth compared to the previous year, which only had two months of growth.
- Nashville set a record with the most rooms sold in a single month in May and October.
- November is trending positive with demand up 6.6% year-over-year and is on pace to potentially set a record for rooms sold in November.
- The best weekends for Nashville demand:
 - o October 17-18 with over 77,000 rooms on Friday/Saturday
 - o October 10-11 with over 77,000 rooms on Friday/Saturday
 - o March 28-29 with 92% occupancy
 - o Takeaway: Peak leisure travel season of March through early November is yielding strong results. Concerts, large conventions, Vanderbilt football's success, Titan's games, spring break, TSU homecoming, and CMA fest are major contributors.
- The total market for the greater Nashville area (including neighboring towns like Franklin and Murfreesboro) has 61,179 hotel rooms making the area a Top 25 US hotel market.
- Metro Nashville has 42,241 with supply increasing 3.4% year over year. This is a 58% increase from 10 years ago.
- Downtown core has 14,295 hotel rooms and 1,300 additional rooms are scheduled to open through 2027 in the city.
- The current hotel pipeline includes 13,316 rooms in development.
 - o Upcoming hotel openings:
 - Tempo by Hilton Nashville Midtown opens in March with 161 rooms
 - Dolly Parton's Songteller Hotel with 245 rooms opens June 2026
 - The Pendry to open in spring-2027 with 180 new luxury rooms
- Hotel forecast from CoSTAR for the greater Nashville market indicates room demand in 2026 will increase 1.3%.
- Projected occupancy rate for 2026 is expected to decline 1.3% as the market increases room supply by another 2.6% after 3.3% increase in 2025.
- Demand for short-term rentals demand has increased 8.5% through October.
- Currently there are about 9,500 active listings with 29% being four-bedroom units. Year-to-date supply has increased by 7.3% this year.
- BNA served 114 destinations with nonstop flights. This is 300+ daily departures.
- 2025 saw growth in international passenger volume. The new Iceland flight saw 30,000 passengers in 6 months.
- Europe is the largest Nashville International Market representing 30% of the total.
- BNA saw 28% growth in the second quarter of the year when the new flights to Iceland, Dublin, and expanded London service came online.

- BNA broke its own daily passenger record on October 6, 2025, with more than 116,000 passengers traveling through BNA. Year to date the top origin markets flight to BNA are:
 - o New York
 - o Chicago
 - o Denver
 - o Los Angeles
 - o Boston
- 2,592,695 passengers passed through BNA in October 2025. Volume increased 11.5% vs the previous October and 4% year to date.
- The biggest obstacles for 2026 are the increased choices for visitors with increased hotel room supply, more restaurants, and attractions, creating a competitive environment for our marketplace and members.

Discussion ensued on the following:

- NCVC clarified that short-term rentals remit occupancy tax to the city. Major booking sites like Airbnb and VRBO require a tax number to register.
- Clarity on where Nashville ranks with hotel occupancy. Nashville ranks in the teens of top cities based on hotel occupancy.

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

- Nashville's market continues to perform well and continues to evolve.
- Overall visitation continues to grow. The most consistency is from meetings. Leisure is highest later in the week and weekends.
- Hospitality businesses grow in every sector – hotels, restaurants, bars, venues, and retail
- NCVC continues to see a new trend of creative offerings like pop-up concerts, special exhibits, curated designers, themed lobbies, and event space, etc.
- Visitors continue to visit in record numbers, but there are more choices than ever in how to spend their entertainment budget. Creativity is key for local businesses competing for visitor attention and dollars.
- NCVC continues to see fierce local competition for visitors' entertainment budget.
- Ivey reiterated that NCVC's job is to drive visitors to the city. Hospitality businesses market themselves to visitors as they determine what to do when they arrive.
- NCVC's team continues to assist in promoting special deals and offerings with a deals and discount page and Winter Rocks promotion in response to research demonstrating that leisure visitors are seeking and purchasing discounted offerings.
- NCVC is doing more advertising than ever before, giving people more reasons to visit Nashville.
- NCVC has worked with partners to recruit more events such as:

- Basketball games at Bridgestone Arena to be featured on ESPN featuring Kentucky vs Gonzaga and Tennessee vs Illinois December 5th and 6th.
 - FCS football championship will be January 5th at FirstBank Field
 - AU Pro Basketball will feature 40 professional athletes at Municipal Auditorium for 5-6 weeks.
- Winter Rocks Promotion will be December – February, aimed at the slower winter months. It focuses on deals and discounts to highlight budget travel (free music seven days a week, etc.). It also includes paid digital and meta campaigns, including OTA's and paid searches. It will also be promoted across all NCVC channels. NCVC continues to solicit opportunities from partners.
- New Year's Eve will feature headliners Lainey Wilson, Bailey Zimmerman, Jason Aldean and CeCe Winans, who will also include the Fisk Jubilee Singers during her primetime performance. The event begins at 5:30 p.m. at Bicentennial Mall with the live show on CBS from 7:00 p.m. – 12:30 a.m.
- The 2024 show coverage was equivalent to over \$400 million in ad equivalence with over 220,000 attending. It resulted in \$41 million direct visitor spending.
- This year the event's local partners will be:
 - Ronald McDonald House – Nashville
 - Sober Space / Cumberland Heights
 - Safe Bar / Sexual Assault Center
 - Red Frogs
 - KultureCity
- Nashville has received a significant amount of national broadcast exposure in the 4th quarter. The exposure includes:
 - Nashville 9-1-1 on ABC – they have spent \$51 million in advertising the show
 - The Road with Keith Urban and Blake Shelton on CBS
 - American Idol on ABC filmed an episode in September
 - College Game Day at Vanderbilt on ESPN
 - SEC Network Game Day at Vanderbilt on SEC Network
 - CMA Awards – ABC
 - CMA Country Christmas – ABC
 - Christmas in Nashville hosted by Trisha Yearwood – NBC
 - A Grand Ole Opry Christmas – Hallmark Channel
 - Christmas at Belmont – Amazon Prime
 - NASHVILLE – Netflix
 - New Year's Eve Live: Nashville's Big Bash – CBS
 - Music City Mistletoe – Streaming on Up Faith and Family
 - Basketball games at Bridgestone Arena - ESPN

Discussion ensued on the following:

- CBS will be filming New Year's Eve content at venues all around the city to include in the live broadcast Vanderbilt's football success has increased occupancy.
- NCVC is concerned about January with a large conference from last year being in February instead of January. Nashville also hosted Anheuser Busch last January and

that was not annual. The team is working with partners to offer special promotions and highlight all events to drive business.

Heather Middleton, Chief Marketing Officer for the NCVC, provided the following Marketing highlights:

- The inaugural issue of Michelin Guide's American South Edition was announced in early November. Nashville received several notable recognitions including:
 - o Strategic Hospitality – Bastion, Locust and Catbird Seat – received one star
 - o 7 restaurants received the Bib Gourmand
 - o 12 Nashville restaurants were named to the Selected/Recommended list
- Inclusion in the guide promotes Nashville's creative culinary scene and helps drive leisure business. This helps promote in two areas that NCVC is focused on – international and luxury.
- Future Partners recent research shows Michelin is well regarded on the international stage. 70% of global travelers are aware of the rating system, with European markets posting the highest awareness. The presence of Michelin star restaurants is important to nearly half of aware global travelers when choosing US destinations.
 - o Data from 2024 showed 54% of American travelers are aware of the Michelin rating system – especially in higher income households
- The Robb Report released the 100 Greatest American Restaurants of the 21st Century and Locust and Catbird Seat both made the list.
- NCVC team members attended Brand USA's Travel Week in London. In addition to meeting with Brand USA about upcoming international media and PR opportunities through Brand USA, NCVC team members had one-on-one meetings with 32 journalists across our key markets in Europe (UK, Ireland, Germany, France, Scandinavia, and Netherlands). The Tourism Sales team conducted more than 40 meetings with clients from across Europe.
- NCVC partnered with Icelandair and Tennessee Tourism around the Nashville Predators appearance in the 2025 NHL Global Series in Stockholm, Sweden by hosting 32 clients and journalists from across Scandinavia and reps from the airline at a pre-game reception. The team also held four product meetings, training 12 sales agents, and met one-on-one with 10 individual journalists including radio interviews.
- The 5th year of the Dine Nashville promotion will be throughout February. This is a ticketed culinary celebration with one-time-only chef collaborations including specials and discounts throughout the month. NCVC has more than seven collaborations confirmed with more being booked.
- NCVC's PR team hosted media from Denmark, Sweden, France, Scotland, and the UK in conjunction with Icelandair to promote the new flight in October.
- NCVC's PR team is currently hosting 11 domestic journalists December 2-6.

A discussion ensued on the following:

- Commissioners asked if Brand USA was federally funded. NCVV confirmed it is a public-private partnership model. Brand USA initially had funding greatly reduced this year and ultimately had most reinstated, engaging with federal partners to advocate for full funding in future.
- NCVV team provided information on Dine Nashville website per inquiry from Commission.

Adrienne Siemers, Chief Sales Officer for the NCVV, provided the following sales highlights:

- IMEX North America's Trade Show was October 6-9 in Vegas.
 - o NCVV team conducted 16 concurrent appointment tracks that 12 member partners participated.
 - o Completed over 750 client interactions between trade show, booth reception, and hosted client dinner.
 - o The sentiment towards Nashville as a meeting destination was strong.
- The NCVV sales team completed multiple Sales Blitzes:
 - o Washington, D.C.
 - NCVV hosted a lunch and reception for 80 total key clients with brother songwriter duo Matt and Josh Jenkins performing at both events and sell Nashville.
 - o Atlanta, GA
 - The Titans sales team joined NCVV for a series of meetings with clients to discuss opportunities for hosting convention events at the new stadium.
 - o PCMA Fashion Show Event
 - NCVV secured sponsorship for three meeting planners to model outfits featuring Nashville-based designers.
 - The event was attended by over 500 meeting industry professionals and highlighted Nashville's creative fashion community.
 - o NCVV staff hosted eight key citywide clients at the CMA Awards to showcase Nashville with a goal of securing future citywide business for the Music City Center, Gaylord Opryland Resort and Convention Center, and hotel community.
- NCVV will be hosting our Customer Advisory Council in December. This includes citywide planners and current clients to provide feedback to improve the planning process and event experience.
- NCVV sales are on pace to reach the FY26 goals. The sales team works to support the hotel community to secure hotel contracts by the end of their fiscal year (Dec. 31).

Discussion ensued on the following:

- Partners on the sales visits are primarily hotels but also include DMCs and AV providers. All partners sell Nashville regardless of individual business.

- Gaylord Opryland Resort and Convention Center construction has impacted bookings, but Gaylor has done a good job of rebooking groups. Their timeline is through 2026.
- How the NCVC has supported BNA through some of their recent challenges by working with their communications team. Chair LeClaire pointed out that record-breaking passengers means record-breaking traffic.

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

- The NCVC's Chart Climber program graduated the 2025 class after eight sessions. Thanks to the support of Amazon, the Chart Climbers Advisory Committee has approved a second-year class of applicants.
- The 2026 cohort will begin classes in January. This program focuses on helping small, minority-owned, businesses who wish to grow their companies through Nashville's hospitality industry.
- The National Society of Black Engineers will hold its annual convention in Nashville in 2030 with over 8,000 attendees.

LeClaire announced the next meeting will be February 10, 2026.

LeClaire called for any additional business, there is none.

LeClaire motioned to adjourn the meeting at 9:11 a.m.; Free seconded; the motion passed unanimously.